Outlook 2007: Part II

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Outlook 2007

Part II

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ISBN 978-87-7681-892-0

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Outlook 2007: Part I

Section 4 Scheduling with Calendar

Objectives

At the completion of this lesson you will be able to:

- Navigating in Calendar
- Making and Moving Appointments
- Managing Appointments

Topics

Navigating in Calendar
Viewing a Day, a Week, or a Month
Using the Date Navigator
Viewing a Range of Dates, Several Weeks, and Discontiguous Days
Showing Two Time Zones
Making and Moving Appointments
Selecting an Appointment and Modifying the Date in Day View
Modifying the Date in Week View
Changing the Time of an Appointment
Managing Appointments
Editing Recurring Appointments
Creating Tentative Appointments
Inserting All Day Events
Deleting Appointments
Restoring Deleted Appointments
Assignment

Navigating in Calendar

In the Calendar folder, you can schedule *appointments* and review your *tasks.* An appointment is a scheduled activity that does not involve anyone else. A task is an activity you must perform and track to completion.

To manage your time effectively, you must be able to move easily from one date to another within your Outlook Calendar and to display each date in the desired view. The Calendar toolbar offers quick access to various Calendar views. The *Date Navigator,* which looks like a monthly calendar, helps you speedily move from one week or month to another. You can even show two time zones, which helps you when traveling or when working with someone at an office in another time zone. The *TaskPad* holds your to do list. Figure 4-1 shows the Calendar screen elements.

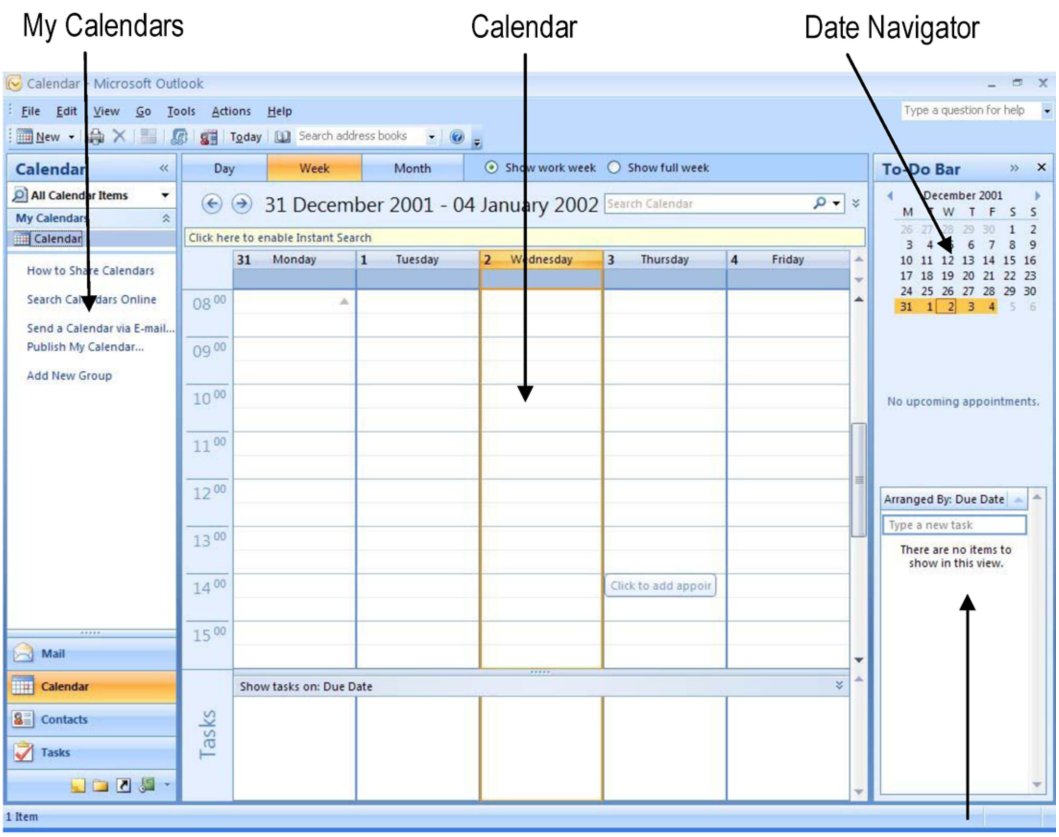


Figure 4-6 : The Calendar Screen Elements

Viewing a Day, a Week, or a Month

In the Calendar, you can display your appointments by Day, Week, or Month view. You can also choose to filter the Current View. Table 2-5summarizes the built-in Current view filters.

Name	Function
Day/Week/Month	Shows the Calendar as an appointment book. Displays the date(s) selected on the Date Navigator.
Active Appointments	Lists all active appointments. You can sort appointments by Subject, Start Date, End Date, and so forth.
Events	Lists all active holidays and events.
Annual Events	Lists active annual events only.
Recurring Appointments	Lists recurring appointments only.
By Category	Groups active appointments by category.

Table 4-10: The Calendar Current View Filters

On the toolbar, the context-sensitive Calendar buttons provide you with a quick means to change views and to return to today's date. Some of these toolbar buttons are visible only when you maximize Outlook. Table 4-11 summarizes the Calendar toolbar buttons and their functions.

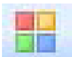
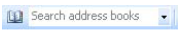
Button	Name	Function
	New Appointment	Opens the New Appointment window so that you can create an appointment. The drop-down arrow gives you access to the New windows for the other Outlook features.
	Print	Allows you to print your Calendar
	Delete	Deletes an appointment from your calendar
	Categorize	Allows you to setup colour categories for your different appointments
	Group Schedules	Displays the group schedules associated with this calendar
	Today Button	Takes you to the current date
	Search Address Book	Allows you to search for a particular contact in your address book

Table 4-11: The Calendar Toolbar Buttons

Method

To view a day, a week, or a month:

1. On the toolbar, click the button for the view you want. Figure 4-2

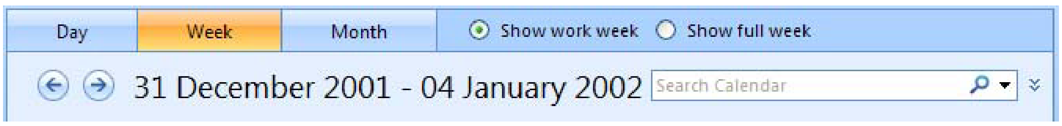


Figure 4-2: Change the calendar view

Exercise

In the following exercise, you will view a day, a week, and a month.

1.	Open the Calendar folder	*The Calendar for today, the Date Navigator, and the TaskPad appear in Day/Week/Month view.*
2.	On the toolbar, click the Week button	*The Calendar changes to Week view.*
3.	On the toolbar, click the Month button	*The Calendar changes to Month view. The Date Navigator and the TaskPad are hidden.*
4.	On the scroll bar, click the top scroll arrow once	*The Month view starts and ends one week earlier.*
5.	On the scroll bar, drag the scroll box up about ¼ inch slowly	*As you drag, a box that gives you the starting date for the five-week period that would appear when you release the pointer appears, with the date changing as you continue to drag.*
6.	On the toolbar, click the Go to Today button	*The Calendar continues to appear in its current view, but it changes the time period displayed to include the current day.*
7.	On the toolbar, click the Day button	*The Calendar changes to Day view, showing today's date. The Date Navigator and the TaskPad reappear.*

Using the Date Navigator

The Date Navigator, shown in Figure 4-3, is not only a monthly calendar but gives you quick access to any date you want. You might have one or two months displayed in your Date Navigator, depending on your screen resolution. By adjusting the pane size, you can expand the Date Navigator to display more months. You adjust the pane size using the double-headed arrow mouse pointer, shown in Figure 4-.

When the Calendar opens, the Date Navigator highlights today's date (December 30, 2001, as shown). It always displays today's date with a box around it so you can find it easily. And it displays dates on which you have scheduled appointments in bold.

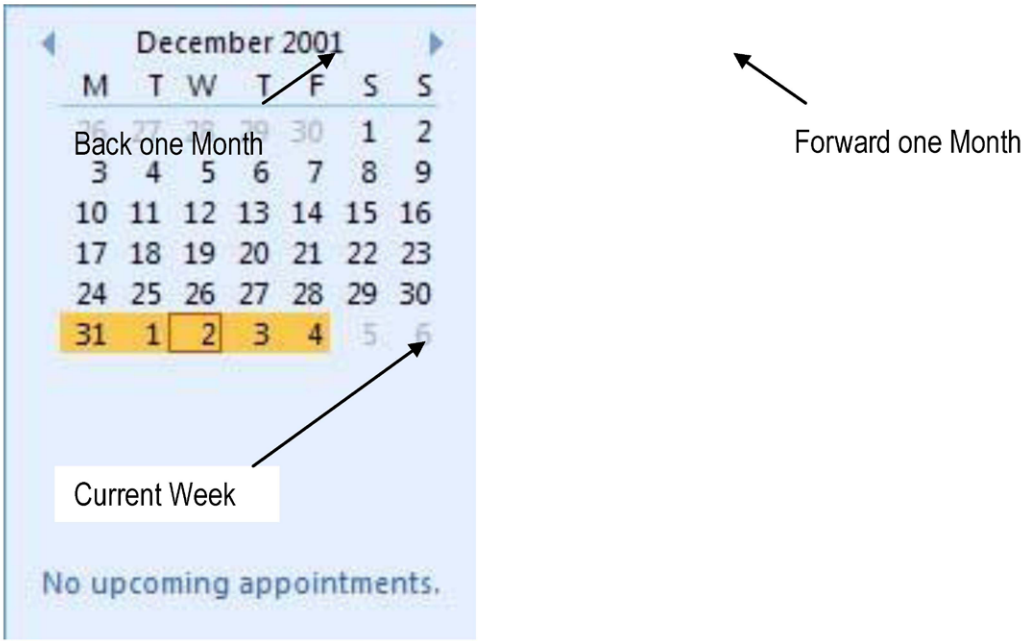


Figure 4-3: The Date Navigator

Figure 4-4: The Double-Headed Arrow Mouse Pointer

Method

To view appointments for a day during the current month:

1. On the Date Navigator, click the desired date.

To adjust pane size to show a different number of months in the Date Navigator:

1. Position the mouse pointer over the border between the panes you want to adjust.
2. When the mouse pointer becomes the double-headed arrow mouse pointer, drag the border to the desired position.

To view appointments in another month:

1. Click the One Month Back arrow once for each previous month or the One Month Forward arrow once for each future month.or
2. Click and hold the month label, and then,on the pop-up month list, drag the mouse pointer to the desired month.
3. Click the desired date.

Exercise

In the following exercise, you will use the Date Navigator to view dates in your Calendar.

1.	On the Date Navigator, click tomorrow's date	*The Calendar for tomorrow appears.*
2.	On the Date Navigator, click the One Month Forward arrow	*Next month's Date Navigator appears. The Calendar for the date you selected appears.*
3.	On the Date Navigator, click the 25th of the displayed month	*The Calendar for the 25th of the displayed month appears.*
4.	On the Date Navigator, click the One Month Forward arrow two times	*The Date Navigator for three months from now appears. The Calendar for the 25th of the month three months from today appears.*
5.	Click and hold the month label	*The pop-up month list appears.*
6.	Drag the mouse pointer to the current month	*This month's Date Navigator appears. The Calendar for the 25th of this month appears.*
7.	On the toolbar, click the Go to Today button	*The Calendar for today appears.*
8.	Position the mouse pointer over the border that separates the Calendar from the Date Navigator	*The mouse pointer becomes the double-headed arrow mouse pointer.*
9.	Drag the border to the left	*The border does not appear to move; however, a vertical line that indicates that you can view one more month in the Date Navigator appears while you are dragging. Once you release the mouse button, a calendar for an additional month appears in the Date Navigator.*
10.	On the Date Navigator, click any date next month	*The Calendar for the date you selected appears.*
11.	Drag the vertical border back to the right	*One column of calendars disappears in the Date Navigator.*
12.	Click the Go to Today toolbar button	*The Calendar for today appears.*

Viewing a Range of Dates, Several Weeks, and Discontiguous Days

You can also use the Date Navigator to view selected days, such as a five-day work week, the next three Tuesdays, three weeks, or whatever days you like. If the days are contiguous, you can drag across them to display them. If they are discontinuous, you select the days by holding Ctrl and clicking the desired dates, just as you would select multiple files in Microsoft Explorer.

Method

To view a range of dates:

1. On the Date Navigator, drag across the dates.

To view several weeks:

1. Position the mouse pointer near the left edge of the Date Navigator.
2. When the pointer changes from pointing left to pointing right, drag the pointer along the left edge of the Date Navigator for the desired weeks.

To view discontinuous days:

1. Press and hold **Ctrl**
2. On the Date Navigator, click each date you want to view.
3. Release **Ctrl**

Exercise

In the following exercise, you will view a range of dates, three weeks, and discontinuous days.

1.	On the Date Navigator, drag from today's date through the next two days	*Today, tomorrow, and the next day appear on your Calendar.*
2.	Position the mouse pointer near the left edge of the Date Navigator	*The pointer changes to an arrow pointing right.*
3.	Drag the pointer along the left edge of the Date Navigator for the second and third full weeks of this month	*The second and third full weeks of this month appear on your Calendar.*
4.	On the Date Navigator, click today's date	*Today's date is selected and appears on your Calendar.*
5.	Press and hold **Ctrl**	
6.	On the Date Navigator, click the date one week from today	*Today's date and the date one week from today appear on your Calendar.*
7.	Release **Ctrl**	
8.	On the Date Navigator, click today's date	*Only today's date appears on your Calendar.*

Showing Two Time Zones

When you work regularly with an office in another time zone, you might find it helpful to display that office's time zone as well as your own when displaying the Calendar. This can help you plan phone calls for the right time of day. You set the time zone display in the Time Zone dialog box, shown in Figure 4-5.

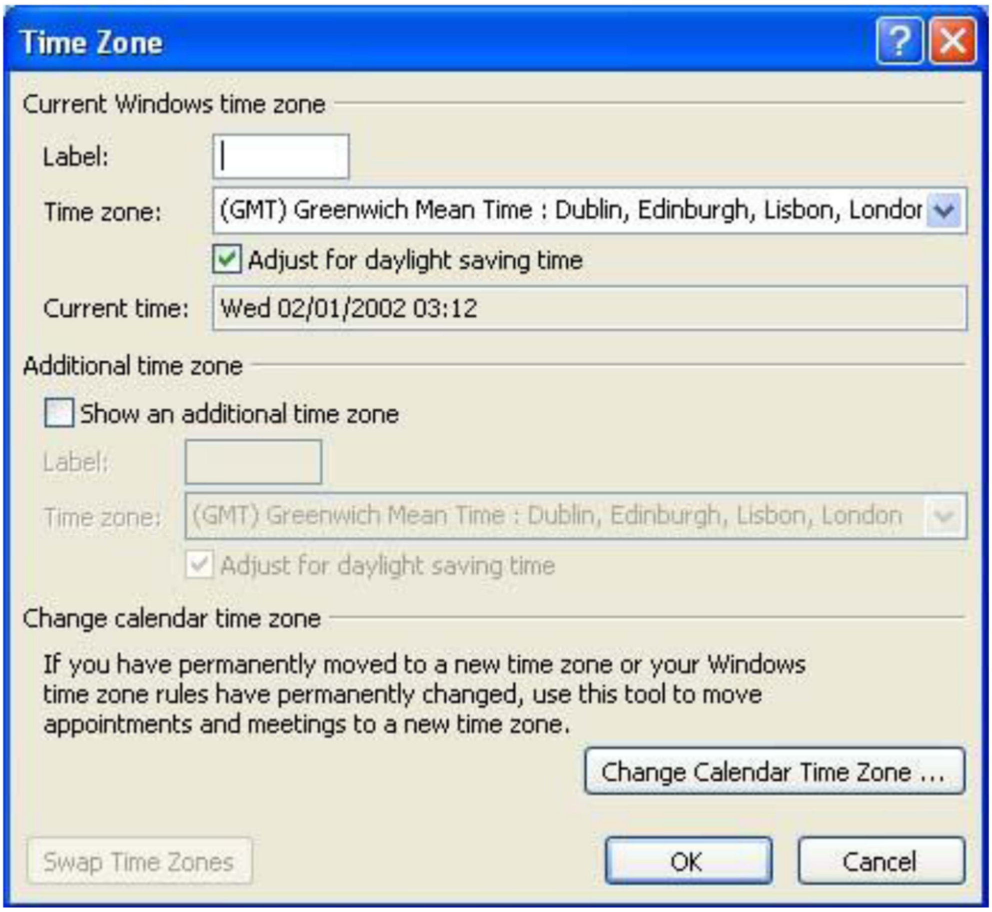


Figure 4-5: The Time Zone Dialog Box

Method

To show two time zones:

1. In the Calendar, from the Tools menu, choose Options.
2. In the Options dialog box, click the Calendar Options button, then click the **Time Zone…** button.
3. In the Time Zone dialog box, in the Current time zone area, in the Label text box, type a short name for the current time zone.
4. Select the *Show an additional time zone* check box.
5. In the additional time zone area, in the Label text box, type a short name for the second time zone.
6. In the Time drop-down list, select a time zone.
7. If that time zone uses daylight savings time during the spring and summer, select the *Adjust for daylight saving time* check box.
8. Choose OK.
9. Choose OK.
10. In the Options dialog box, choose OK.

NOTE: **TO CHANGE YOUR CURRENT TIME ZONE TO THE SECOND TIME ZONE, IN THE TIME ZONE DIALOG BOX, CHOOSE SWAP TIME ZONES. THIS, HOWEVER, AFFECTS ALL TIMES DISPLAYED IN ALL YOUR WINDOWS-BASED PROGRAMS, NOT JUST THE TIME DISPLAYED IN OUTLOOK.**

Exercise

In the following exercise, you will show two time zones.

1.	From the Tools menu, choose Options	*The Options dialog box appears.*
2.	In the Options dialog box, click the Calendar Options button, then click the **Time Zone…** button.	*The Time Zone dialog box appears.*
3.	In the Current time zone area, in the Label text box, type a short name for your time zone	
4.	Select the *Show an additional time zone* check box	*The additional time zone area appears.*
5.	If necessary, select the text in the Label text box, and then type a short name for the time zone directly to the east of your current time zone	
6.	In the Time drop-down list, select the time zone directly to the east of your current time zone (the next earlier time in the drop-down list)	
7.	If necessary, select the *Adjust for daylight saving time* check box	
8.	Choose OK	
9.	Choose OK	*The Options dialog box reappears.*
10.	Choose OK	*The Calendar displays your time zone adjacent to the Calendar and the second time zone to the left of your time zone.*

Making and Moving Appointments

Outlook gives you the flexibility you need to manage your appointments. You usually make appointments in the Day view of the Calendar, although you can also set an appointment in the Week and the Month views. You can edit and move appointments as required in all views. Working in the information viewer, you can edit an appointment by inserting and deleting text, just as you do in a Mail message.

Sometimes you must move an appointment to another day. You can easily modify the date of an appointment in the Day and Week views. To move an appointment within the same calendar week, you can drag and drop it within Day and Week views. To move an appointment farther away in time, you can drag it to the Date Navigator.

Creating Appointments

The most basic method of making an appointment is simple—click a time slot or drag a time period in your Calendar to select it, and then type a description of the appointment. As you type the text of an appointment, the text appears on the screen. If the displayed time slot is not wide enough, the text wraps automatically to the next line when it gets to the right edge of the appointment area.

When you finish describing an appointment, Outlook saves the entry as soon as you click somewhere outside the appointment time slot. Even if you choose to exit the program, you do not need to click a Save button or choose Save from a menu to save your appointment.

You can make a more detailed appointment using the New Appointment window, shown in Figure 4-5. In this window, you can enter additional comments about the appointment, such as the materials you should bring with you to the appointment, directions to the location, and so forth.

By default, Outlook sends you a reminder about your appointments before each appointment. If you want to cancel the reminder or change the interval before the appointment for the reminder to appear, you can do so in the New Appointment window. A bell icon appears in the time slot to indicate that you set a reminder for the appointment.

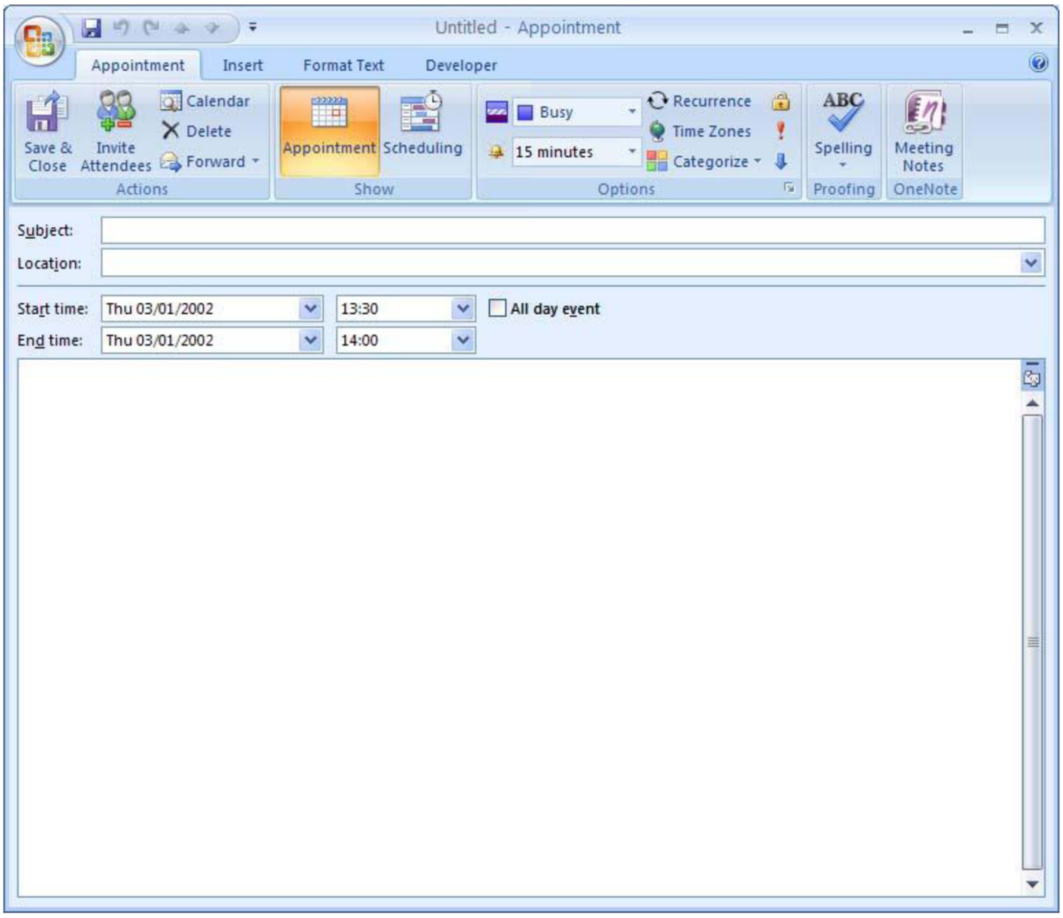


Figure 4-6: The New Appointment Window

You access the New Appointment window by clicking the New Appointment button located on the Calendar toolbar.

Method

To select a time slot or time period:

1. In the Calendar (Day, Week, or Month view), display the desired date.
2. Click the time slot.

   or
3. Drag through as many time slots as necessary.

To create a basic appointment:

1. Select a time slot or time period.
2. Type a description.

To create a detailed appointment:

1. If desired, select a time slot or time period.
2. Double-click the selected time slot or time period.
   or
3. On the toolbar, click the New Appointment button.
4. In the New Appointment window, on the Appointment page, in the Subject text box, type the subject.
5. In the Location combo box, type the location or select it from the drop-down list.
6. If necessary, modify the Start time and End time displayed.
7. If desired, in the large text box at the bottom of the page, type comments about the appointment.
8. On the toolbar, click the Save and Close button.

Exercise

In the following exercise, you will create appointments.

1.	At your instructor's direction, click a thirty-minute time slot approximately one hour from the current time	*The time slot is selected.*
2.	Type **Call to check for new deliveries**	*A **Call to check for new deliveries** appointment appears in your selected time slot.*
3.	Position the mouse pointer over the 2:00 p.m. time slot	
4.	Drag through the 3:00 p.m. time slot	*A 1½-hour time period is selected. The previous appointment is saved.*
5.	Type **Design new floor plan**	*A **Design new floor plan** appointment appears in your selected time slot.*
6.	On the toolbar, click the New Appointment button	*The New Appointment window appears. The previous appointment is saved.*
7.	On the Appointment page, in the Subject text box, type **Reconcile accounts**	
8.	In the Location combo box, type **office**	
9.	In the left Start time combo box, select the date and then type **first Monday of next month**	

10.	In the right Start time combo box, select the time and type **nine a.m.**	*The entry in the left Start time combo box changes to show the actual date when you clicked or tabbed to the next data entry field.*
11.	In the right End time combo box, select the time and type **noon**	*The entry in the right Start time combo box changes to show the time in numerals when you clicked or tabbed to the next data entry field.*
12.	In the Reminder area, make sure the Reminder check box is selected	
13.	In the Reminder drop-down list box, make sure 15 minutes is selected	
14.	In the large text box at the bottom of the window, type **Get someone to cover phones.**	*The entry in the right End time combo box changes to show the time in numerals when you clicked or tabbed to the next data entry field.*
15.	On the toolbar, click the Save and Close button	*The Calendar for today reappears.*
16.	Display the Calendar for the first Monday of next month	*The Calendar appears displaying the new appointment on the first Monday of next month.*

Selecting an Appointment and Modifying the Date in Day View

When you modify appointment details, you need to select the appointment before you can edit it. Figure 4-6 shows the Calendar with an appointment selected.

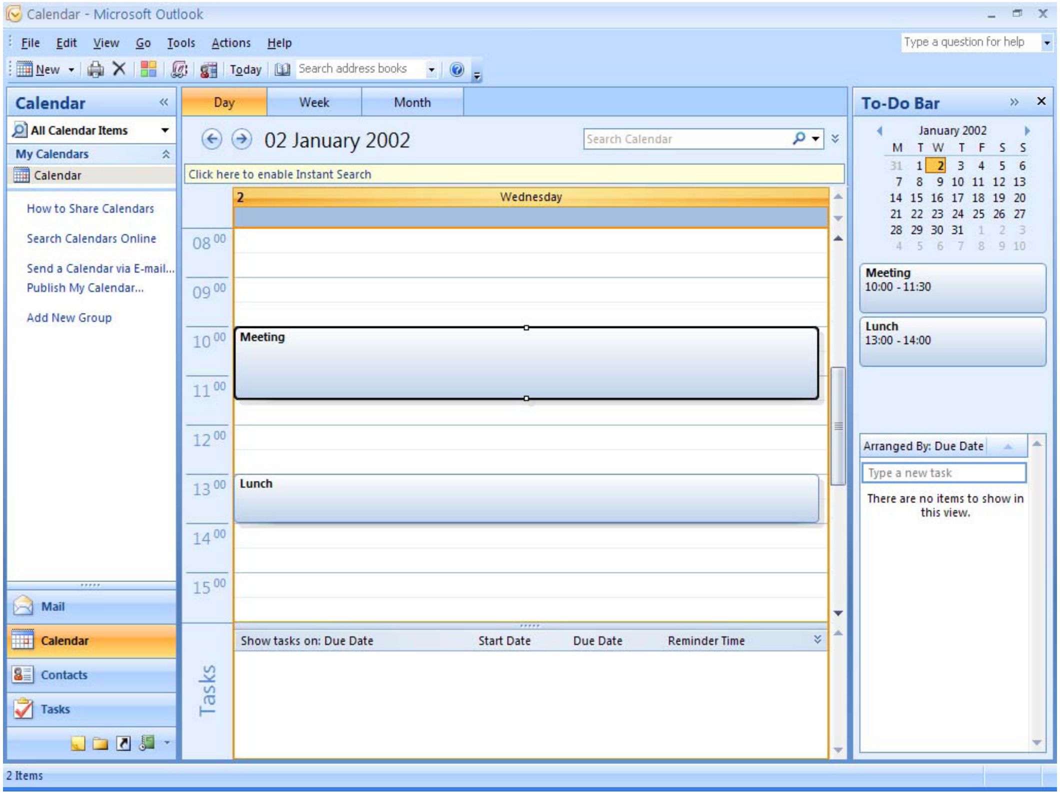


Figure 4-7: The Calendar with an Appointment Selected

When you must move an appointment to a different week, the simplest way is to use the Date Navigator in Day view. You position the mouse pointer over the *move handle,* which is the blue line to the left of the appointment. The pointer becomes a four-headed arrow, shown in **Error! Reference source not found.,** which you use to drag the appointment to the Date Navigator. You select the appointment when you begin to drag it. If you want to reschedule the appointment for the following month, you can adjust the Date Navigator's width to show two months.

Method

To select an appointment:

1. Click the appointment.

To change the date of an appointment in Day view:

1. Position the mouse pointer over the appointment.
2. Drag the appointment to the desired date on the Date Navigator.
   or

3. From the Edit menu, choose Cut.
4. On the Date Navigator, click the new date or time.
   or
5. Display the desired day.
6. From the Edit menu, choose Paste.

Exercise

In the following exercise, you will move the date of an appointment from one week to another and from one month to another in Day view.

1.	Display today's appointments in Day view	
2.	Adjust the Date Navigator to show two months	*The View Menu then select to do bar and then select options*
3.	Position the mouse pointer over the *Design new floor plan* appointment	.
4.	Drag the appointment to Friday of next week on the Date Navigator	*The appointment now takes place on Friday of next week and Friday of next week appears in the Calendar.*
5.	Position the mouse pointer	
6.	Drag the appointment to the first Wednesday of next month on the Date Navigator	*The appointment now takes place on the first Wednesday of next month and the first Wednesday of next month appears in the Calendar.*
7.	Position the mouse pointer	
8.	Click the appointment	
9.	From the Edit menu, choose Cut	*The appointment is placed on the Clipboard.*
10.	On the toolbar, click the Go to Today button	*Today's date appears in the Calendar.*
11.	From the Edit menu, choose Paste	*The appointment is scheduled for today at its original time.*
12.	Adjust the Date Navigator to show just one month	

Modifying the Date in Week View

You can also move an appointment in Week view. You can drag it to a new date displayed on the calendar or on the Date Navigator. Figure 4-8 shows the Calendar in Week view.

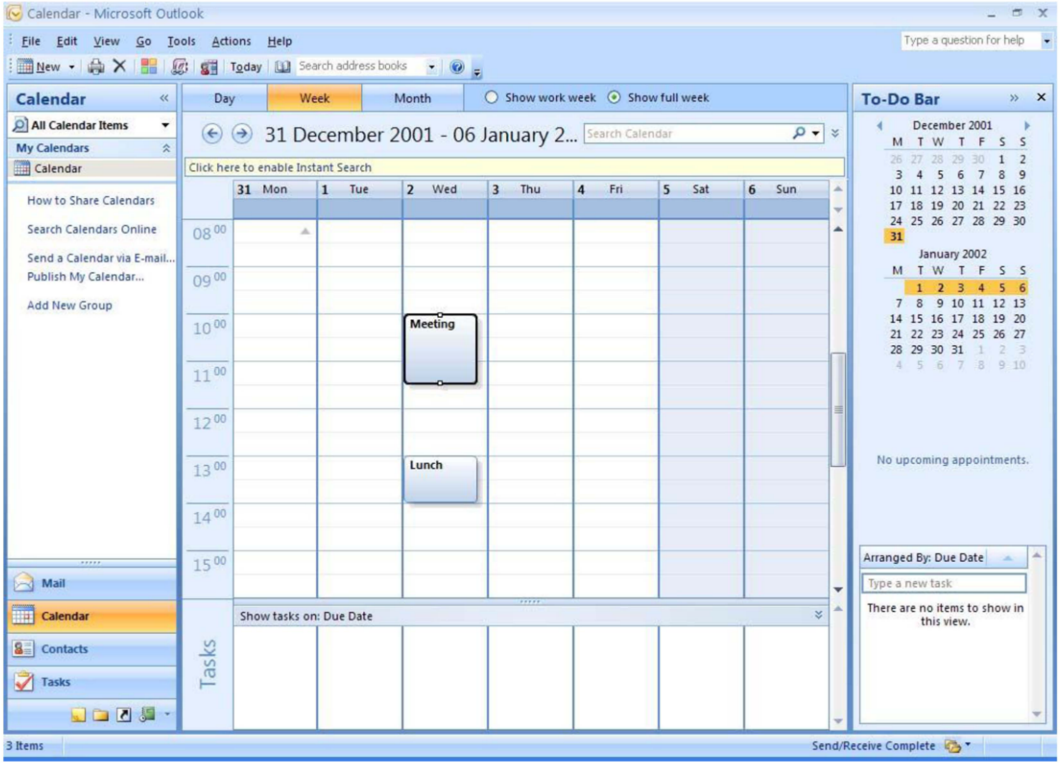


Figure 4-8: *The Calendar in Week View*

Method

To modify the date of an appointment in Week view:

1. Position the mouse pointer over the time area of the appointment.
2. When the pointer becomes a four-headed arrow, drag the appointment to the new date on the Calendar or on the Date Navigator.

Exercise

In the following exercise, you will modify the date of your appointment in Week view.

1.	On the toolbar, click the Week button	*The Week view appears.*
2.	Position the mouse pointer over the time area of the *Design new floor plan* appointment	*The mouse pointer becomes a four-headed arrow.*
3.	Drag the appointment to Friday on the Calendar	*The appointment now takes place on Friday from 2:00 P.M. to 3:30 P.M.*
4.	Position the mouse pointer over the time area of the appointment	*The mouse pointer becomes a four-headed arrow.*
5.	Drag the appointment to Wednesday on the Date Navigator	*The appointment now takes place on Wednesday.*
6.	If today is not Wednesday, position the mouse pointer over the time area of the appointment	*The mouse pointer becomes a four-headed arrow.*
7.	Drag the appointment to today's date on the Calendar	*The appointment now takes place today.*
8.	On the toolbar, click the Day button	*Today's Calendar appears in Day view.*

Changing the Time of an Appointment

Outlook lets you easily modify the beginning and ending times of an appointment. If you must move an appointment to another time slot in the same day, you can drag it there with the move handle. You can change just the start-up time of an appointment by dragging the top *appointment handle* with the double-headed arrow or change just the ending time of an appointment by dragging the bottom appointment handle with the double-headed arrow. The appointment handles are the blue borders at the top and the bottom of a selected appointment that allow you to change the appointment beginning and ending times.

Method

To move an appointment to another time slot on the same day:

1. Position the mouse pointer over the move handle.
2. When the pointer becomes a four-headed arrow, drag the appointment to the new time slot.

To change the start up time or the ending time of an appointment:

1. Position the mouse pointer over an appointment handle.
2. When the pointer becomes a double-headed arrow, drag the appointment handle to the new time.

Exercise

In the following exercise, you will change the time of your appointment.

1.	Position the mouse pointer over the *Design new floor plan* appointment	
2.	Click and Drag the appointment one hour later	
3.	Select the appointment again	
4.	Position the mouse pointer over the top appointment handle	*The mouse pointer becomes a double-headed arrow.*
5.	Drag the top handle to 1:30 p.m.	*The appointment now begins at 1:30 p.m.*
6.	Position the mouse pointer over the bottom appointment handle	*The mouse pointer becomes a double-headed arrow.*
7.	Drag the bottom handle to 3:00 P.M.	*The appointment now ends at 3:00 P.M.*

Managing Appointments

Outlook provides a variety of more complex time-management capabilities, including creating *recurring appointments* and *tentative appointments.* Recurring appointments are those appointments in your schedule that occur regularly, such as a biweekly review of orders or preparing a monthly report. Tentative appointments are those appointments for which you need to reserve a time slot even though they might not take place.

You can also mark *events,* days on which you observe or celebrate something while conducting business as usual. For example, you would mark your birthday as an event. You can also mark a conference as an event, and then schedule the individual sessions you plan to attend as appointments.

In addition, should you need to cancel an appointment, Outlook lets you delete it so you can schedule another appointment in your newly freed time period.

Creating Recurring Appointments

When you schedule a recurring appointment, Outlook automatically places all future occurrences of the appointment in your Calendar for the period you specify. The Appointment Recurrence dialog box, illustrated in Figure 4-9, lets you define recurring appointments.

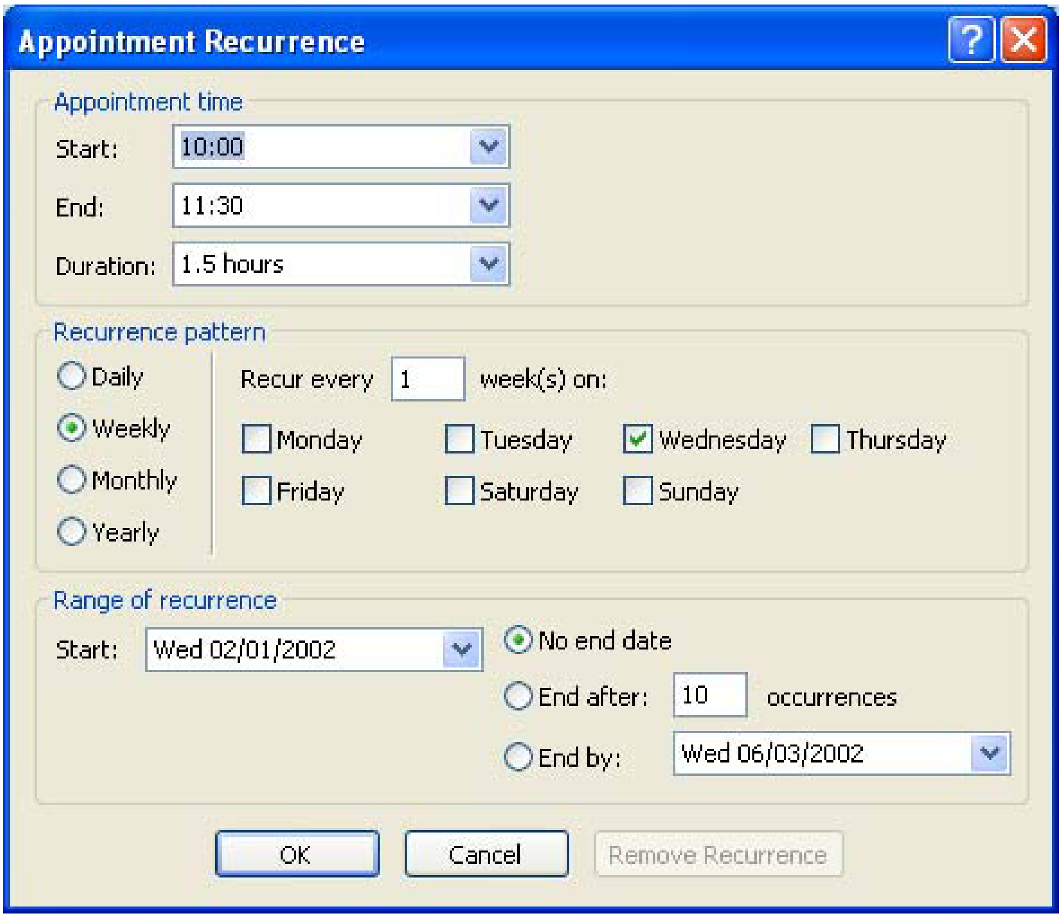


Figure 4-7: The Appointment Recurrence Dialog Box

When you have scheduled a recurring appointment, your Calendar shows the Recurrence icon, a circle made from two arrows, which appears at the left of the appointment, as shown in Figure 4-10.

Figure 4-8: A Recurring Appointment Displaying the Recurrence Icon

Method

To create a recurring appointment:

1. Select a time slot or time period.
2. From the Calendar menu, choose New Recurring Appointment.
3. In the Appointment Recurrence dialog box, in the Recurrence pattern area, in the left column, select a time period option button.

4. In the Recurrence pattern area, in the right column, select the appropriate option button or check boxes and, if necessary, fill in the required information.
5. In the Range of recurrence area, select the appropriate end date option button and fill in required information.
6. Choose OK.
7. Complete the New Appointment window, and then, on the toolbar, click the Save and Close button.

Exercise

In the following exercise, you will create a recurring appointment.

1.	On the Calendar, select 11:00 A.M. to 2:00 P.M. on the third Monday of next month	
2.	From the Calendar menu, choose New Recurring Appointment	*The Appointment Recurrence dialog box appears over the New Appointment window.*
3.	In the Recurrence pattern area, in the left column, select the Monthly option button	
4.	In the Recurrence pattern area, in the right column, select the second option button	
5.	In the Range of recurrence area, make sure the No end date option button is selected	
6.	Choose OK	*The New Appointment window appears.*
7.	In the Subject text box, type **Mayor's monthly business lunch**	
8.	In the Location text box, type **restaurant**	
9.	In the large text box at the bottom of the window, type **The mayor always orders stuffed grape leaves.**	
10.	On the toolbar, click the Save and Close button	*The appointment appears on the Calendar displaying the subject and the location. The appointment displays the Recurrence icon.*

Editing Recurring Appointments

You can edit recurring appointments by reopening the Appointment Recurrence dialog box. Before this dialog box appears, however, the Open Recurring Item message box, shown in Figure 4-11, appears. In this message box, you specify whether the change is for this occurrence only or for the entire series.

Figure 4-9: The Open Recurring Item Message Box

Method

To edit a recurring appointment:

1. Double-click the appointment.

   or

1. Select the appointment, and then, from the File menu, choose Open.

2. In the Open Recurring Item message box, select the desired option button, and then choose OK.
3. In the Recurring Appointment window, make the changes.
4. If desired, from the Appointment menu, choose Recurrence.
5. In the Appointment Recurrence dialog box, make the changes.
6. Choose OK.
7. In the Recurring Appointment window, on the toolbar, click the Save and Close button.

Exercise

In the following exercise, you will edit a recurring appointment.

1.	If necessary, select the *Mayor's business lunch* appointment	
2.	From the File menu, choose Open	*The Open Recurring Item message box appears.*
3.	Select the Open the series option button	
4.	Choose OK	*The Recurring Appointment window appears.*
5.	In the Subject text box, select the word *monthly* and type **biweekly**	
6.	From the Appointment menu, choose Recurrence	*The Appointment Recurrence dialog box appears.*
7.	In the Recurrence pattern area, in the left column, select the Weekly option button	
8.	In the Recurrence pattern area, in the right column, select the number in the *Recur every…weeks* text box, and then type **2**	
9.	Choose OK	*The Recurring Appointment window shows the appointment recurring every two weeks beginning with the selected date.*
10.	On the toolbar, click the Save and Close button	*The edited appointment appears on the Calendar.*

Creating Tentative Appointments

Sometimes you might want to reserve a time slot even if you are not sure an appointment is definite. For example, if you want to attend a training class but your supervisor has not approved the expense yet, you can mark the time slot as a tentative appointment. to reserve the ti Tentative appointments display a light blue move handle to the left of the appointment.

Method

To create a tentative appointment:

1. Create an appointment but do not close the New Appointment window.
2. From the Options Grouping on the Ribbon, select the down arrow next to busy and select Tentative.
3. On the toolbar, click the Save and Close button.

Exercise

In the following exercise, you will create a tentative appointment.

1.	On the Date Navigator, select next Tuesday	*The Calendar displays next Tuesday.*
2.	On the Calendar, select the time period from 9:00 A.M. to 1:30 P.M.	
3.	On the toolbar, click the New Appointment button	*The New Appointment window appears.*
4.	In the Subject text box, type **Excel training class**	
5.	From the Show time as drop-down list, select Tentative	
6.	On the toolbar, click the Save and Close button	*The appointment appears on the Calendar. The move handle is shaded blue/white..*

Inserting All Day Events

You can remember special business and personal days by inserting them using the All Day Event option, shown in Figure 4-10. Outlook displays events at the head of your Calendar, as illustrated in Figure 4-11. Here is a simple place to list pay days, birthdays, anniversaries, and other significant events that do not require appointments during your work day. If the event lasts several days, Outlook displays it every day for its duration.

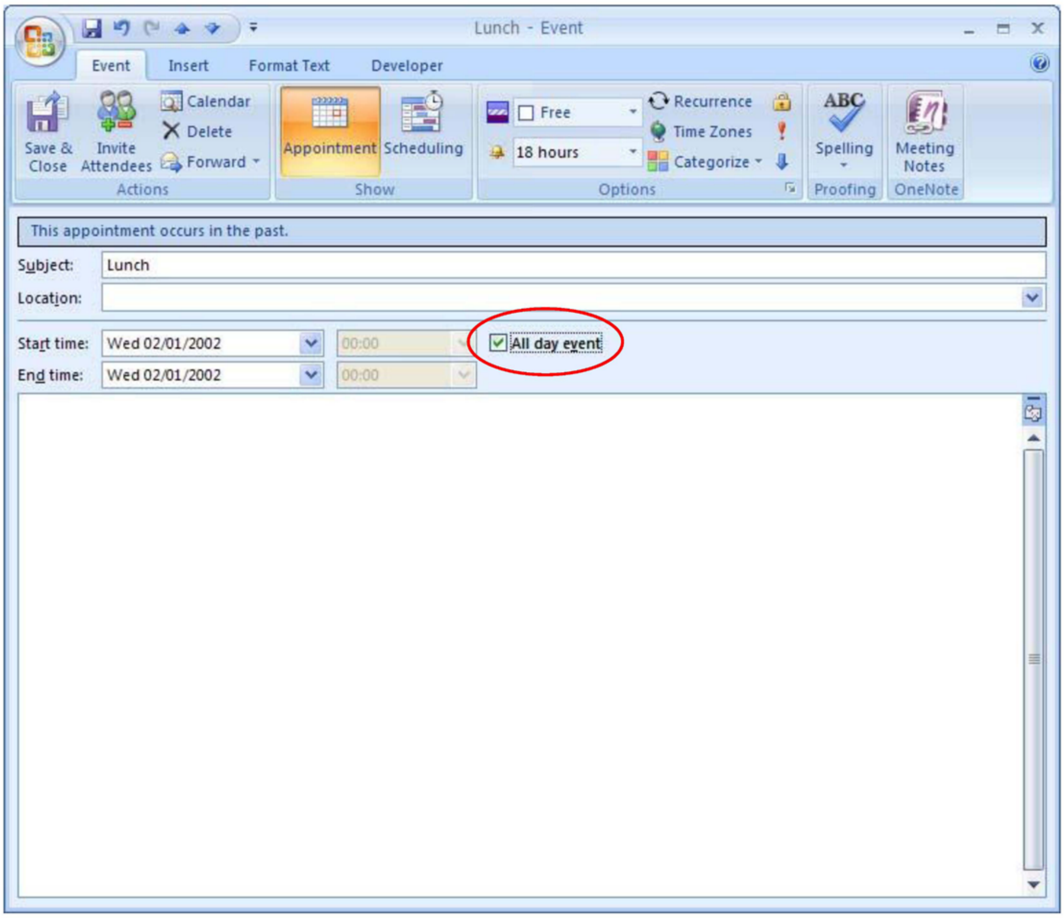


Figure 4-10: The New Event Window

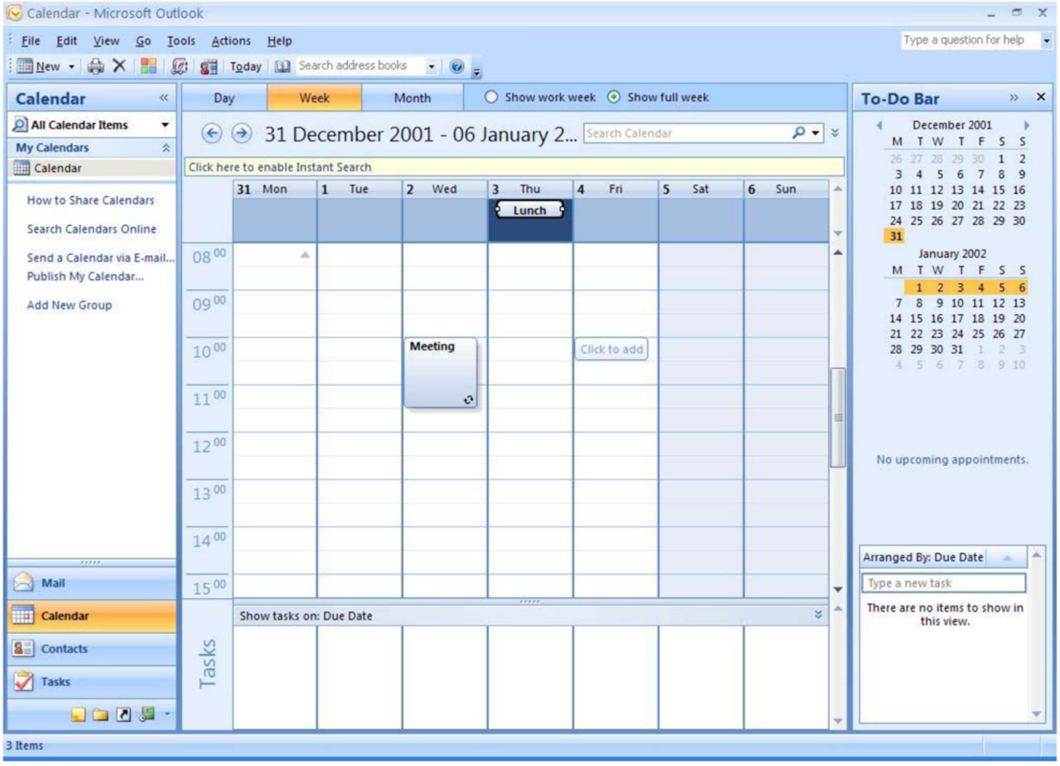


Figure 4-11: The Calendar with an Event Displayed

Method

To insert events:

1. From the Calendar menu, choose New Appointment.
2. In the New Event Appointment, complete the text boxes, select the options buttons and check boxes, and so forth, as if you were creating a new appointment.
3. Make sure the 'All day event' check box is selected.
4. Make sure Free is selected in the 'Show time' as drop-down list box.
5. On the toolbar, click the Save and Close button.

Exercise

In the following exercise, you will insert an event.

1.	From the Calendar menu, choose New Appointment	*The New* Appointment *window appears.*
2.	In the Subject text box, type **Fiesta Launch Party**	
3.	From the Start time drop-down calendar, type **February 24, 2005** or the date your instructor tells you	
4.	Make sure the All day event check box is selected	
5.	Make sure Free is selected in the Show time as drop-down list box	
6.	On the toolbar, click the Save and Close button	*The Calendar reappears.*
7.	Go to the date you selected for Mardi Gras	*The event appears above the Calendar on the selected date.*

Deleting Appointments

You should delete appointments as soon as you cancel them. Prompt deletions keep your Calendar up-to-date and give you and your colleagues an accurate picture for setting meetings. You can use the toolbar button to delete appointments.

Method

To delete an appointment:

1. Select the appointment.
2. From the Edit menu, choose Delete.
   or
3. On the toolbar, click the Delete button.

Exercise

In the following exercise, you will delete an appointment.

1.	Display today's date	
2.	In the Calendar, select the *Call to check for new deliveries* appointment	
3.	On the toolbar, click the Delete button	*The appointment is deleted.*

Restoring Deleted Appointments

If you delete an appointment in error and realize your mistake immediately after the deletion, you can restore it quickly. If you take any other action before restoring the appointment, however, you must recreate the deleted appointment from scratch.

Method

To restore a deleted appointment immediately after deleting it:

1. From the Edit menu, choose Undo Delete.

   or

1. On the toolbar, click the Undo Delete button.

Exercise

In the following exercise, you will restore a deleted appointment.

1.	On the toolbar, click the Undo Delete button	*The* ***Call to check for new deliveries*** *appointment is restored.*

Assignment

1. On the Friday before the third Monday of next month, make a one-hour appointment located in your office beginning at 9:00 a.m. to review preparations for the mayor's biweekly luncheon. Make a note that says: **Order all ingredients for stuffed grape leaves.**
2. Move the appointment to the Thursday before the third Monday, and then move it forward thirty minutes to start at 9:30 a.m.
3. Shorten the appointment to end at 10:00 a.m.
4. Display Friday of the previous week. Make a one-half hour appointment that recurs weekly at 4:30 p.m. to review your staples inventory.
5. Change the inventory appointment to biweekly.
6. On the second Tuesday of every month, create a recurring appointment from 6:00 p.m. to 9:00 p.m. to teach a culinary course at the New Orleans Culinary Institute.
7. Set a reminder for the culinary course for two hours before the course begins.

8. On the fourth Friday following the current date, create a tentative appointment from 5:30 p.m. to 6:00 p.m. for a haircut at Snippets.
9. Delete the haircut appointment and restore it immediately.
10. View your appointments for this week, and then view your appointments for the entire month. Then return to Day view.
11. Show only your time zone.
12. Insert your birthday as an event in your calendar.
13. Restore your Calendar to today's date in Day view.

Section 5 Advanced Formatting

Objectives

At the completion of this lesson you will be able to:

- Work with Tasks
- Manage Tasks

Topics

Working with Tasks
Creating a Task
Selecting and Editing a Task
Making a Task Recurring
Deleting and Restoring a Task
Managing Tasks
Setting the Priority for a Task
Tracking a Task's Status and Marking a Task Completed
Using Task Timeline View
Assignment

Working with Tasks

Tasks are activities or duties you must perform and track through completion. Tasks can be work-related, such as completing and sending in time sheets, or personal, such as purchasing tickets to an event.

The Tasks folder, shown in Figure 5-12, lets you define your tasks. You can display all tasks in a simple list or a detailed list, show only active tasks, show tasks for the next seven days, show overdue tasks, or view your tasks by other criteria.

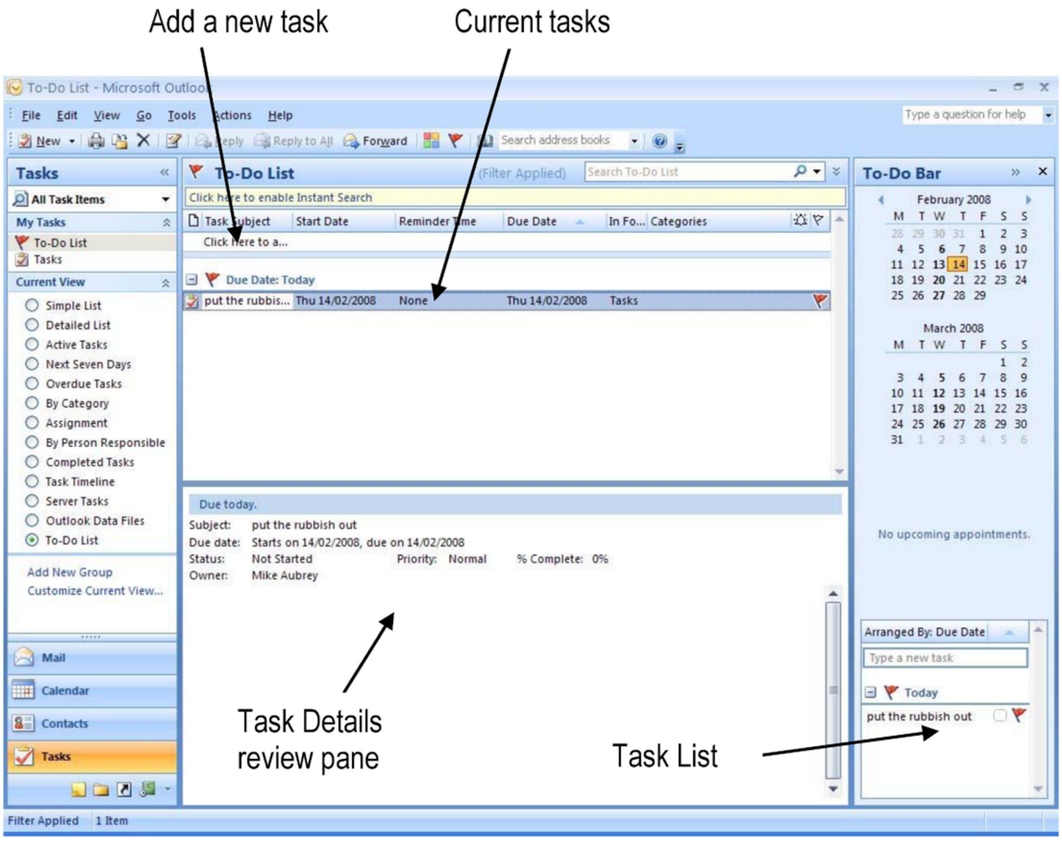


Figure 5-12: Tasks in Simple List View

The TaskPad in your Calendar shows active tasks that you should complete within the next seven days. You can add to the task list in the Tasks folder or on the TaskPad.

Creating a Task

You can create a simple task in your list by clicking the *Click here to add a new Task* text box on the task list in the Tasks folder or on the TaskPad in the Calendar. You then enter your information and click anywhere else on the task list or press **Enter** to save your data. To add more detailed information, however, you must use the New Task window, shown in

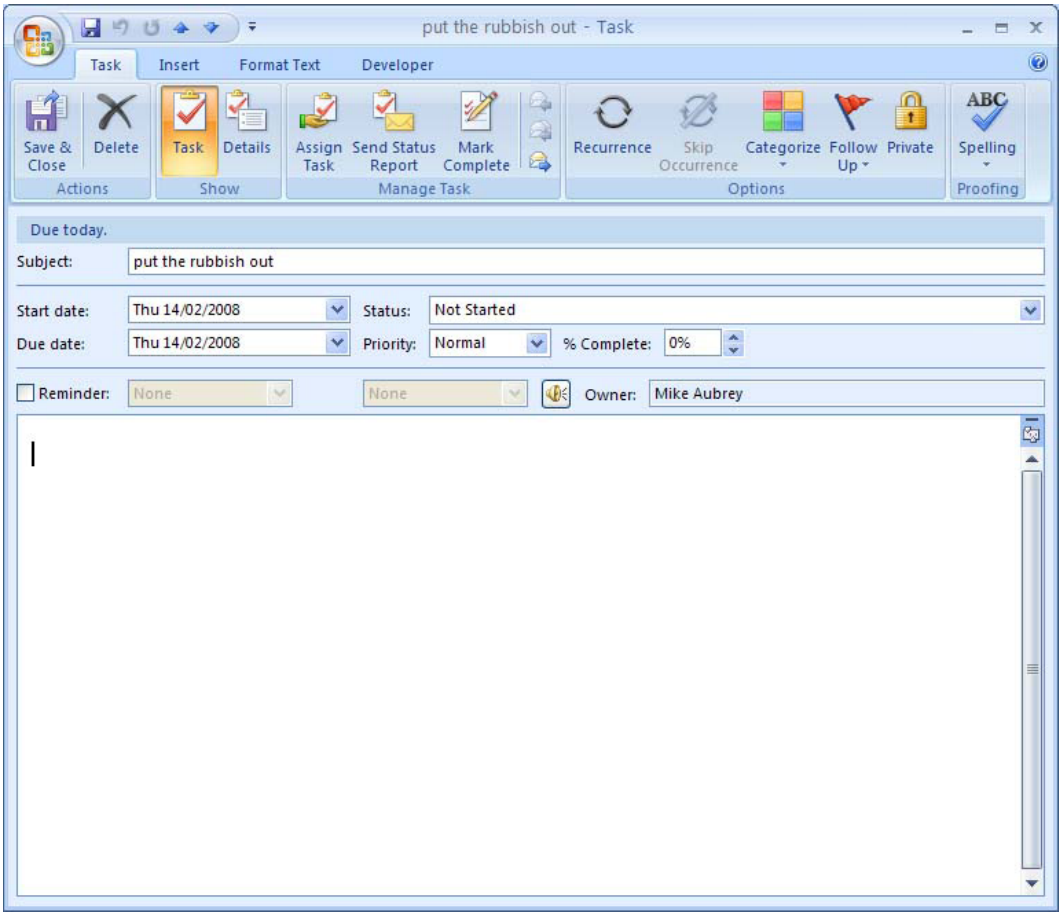


Figure 5-13: In the Task window, you can show the start and due dates, the status, and the priority of the task. You can also set a reminder for the task.

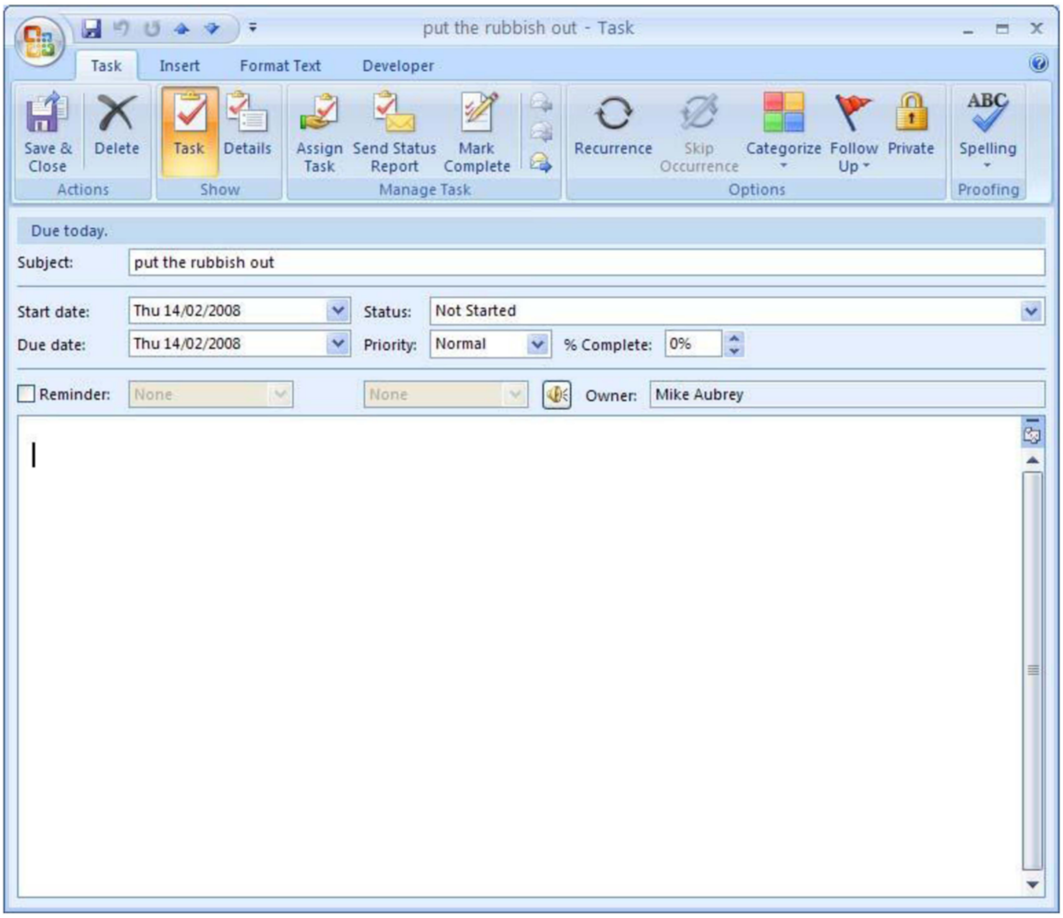


Figure 5-13: The New Task Window

You access the New Task window by clicking the New Task button on the toolbar. Figure 5-3 shows the New Task Window

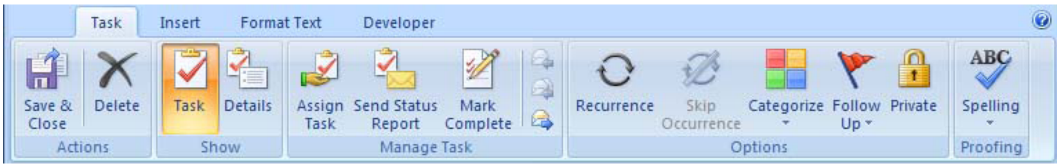


Figure 5-3: New Task Window Ribbon

Method

To create a task:

Task list method

1. Click the *Click here to add a new Task* text box.
2. In the text box, type the subject.

3. If necessary, click the Due Date text box.
4. Enter a due date.

or

5. Click the Due Date drop-down arrow, and then select a date from the Date Navigator.
6. Click anywhere else on the task list.

   or

7. Press **Enter**

New Task window method

1. On the toolbar, click the New Task button.

   or

1. From the Tasks menu, choose New Task.
2. In the New Task window, on the Task page, in the Subject text box, type the subject.
3. In the Due Date area, make sure the None option button is selected.

   or

4. In the Due Date area, in the Start combo box, type the start date or click the Start drop-down arrow and choose a start date from the Date Navigator, and then in the Due combo box, type the due date or click the Due drop-down arrow and choose a due date from the Date Navigator.
5. If desired, set a reminder.
6. If desired, in the large text box at the bottom of the window, add notes.
7. On the toolbar, click the Save and Close button.

Exercise

In the following exercise, you will create tasks.

1.	Open the Tasks folder	*The task list appears in Simple List view.*
2.	Click the *Click here to add a new Task* text box	*The insertion point is in the subject text box. The word **None** appears in the Due Date text box.*
3.	Type **collect recipes for culinary course**	
4.	Click the Due Date text box	*The Due Date text box becomes a combo box.*
5.	Type **first Tuesday of next month**	*The text appears in the Date Due box.*
6.	Press **Enter**	*The new task is added to the task list. The due date appears as a date.*
7.	On the toolbar, click the New Task button	*The New Task window appears.*
8.	On the Task page, in the Subject text box, type **Make signs for Balloon Fiesta stall**	
9.	In the Due Date area, click the Start combo box drop-down arrow, and choose the Today button	*Today's date appears in the Start combo box.*
10.	In the Due Date area, click the Due combo box drop-down arrow, and then choose the first Monday in next March	*The date of the first Monday in next March appears in the Due combo box.*
11.	On the toolbar, click the Save and Close button	*The task appears on the task list.*
12.	Add the tasks in Table 5-2 to your task list	

Task	**Start Date**	**Due Date**
buy copy paper	today	next Tuesday
send flyers re: next month's specials to all customers who left business cards	next Monday	Friday after next Monday
call suppliers about discounts for bulk orders	today	month from today

Table 5-12: Additional Tasks for Task List

Selecting and Editing a Task

Tasks are often not completed as initially conceived. You might find it necessary to change the end date of a task or to edit the task description. You edit tasks in the Task window. You can also make simple edits directly on the task list.

Method

To select a task:

1. Click the task.

To edit a task:

Task list or TaskPad method

1. Select the task.
2. Make the change.
3. Click anywhere else on the task list.
   or

4. Press **ENTER**

Task window method

1. Double-click the task.
   or

1. Select the task, and then, from the File menu, choose Open.
2. In the Task window, make the change.
3. On the toolbar, click the Save and Close button.

Exercise

In the following exercise, you will edit tasks.

1.	On the task list, click the *collect recipes for culinary course* Due Date text box	*The task is selected. The columns to the left of the due date become blue. The drop-down arrow appears.*
2.	Select the due date and type **tomorrow**	
3.	Click anywhere else on the task list	*Tomorrow's date appears in the Due Date text box. The edit is saved.*
4.	Click the *get info on food festival* Subject task box	*The task is selected. The columns to the left and the right of the subject become blue.*
5.	Double-click the task	*The* ***get info on food festival - Task*** *window appears.*
6.	In the Due combo box, select the text and then type **today**	
7.	Choose Save and Close	*The task list reappears. The task displays the new due date.*
8.	Click the *order new tablecloths* task	*The task is selected.*
9.	From the File menu, choose Open	*The* ***order new tablecloths - Task*** *window appears.*
10.	In the notes area, change the number of square tablecloths to 12	
11.	On the toolbar, click the Save and Close button	*The task list reappears.*

Making a Task Recurring

Some tasks you do routinely—for example, you pick up your paycheck every other Friday. You can define these routine tasks as *recurring tasks* so that they are always on your task list. You see the task listed only once, but whenever you complete the task, the next occurrence then appears on the task list.

You schedule recurring tasks in the Task window using the Task Recurrence dialog box, shown in Figure 5-3. If a task already appears on your task list and you want to make it recurring, you can select the task, open its Task window, and then click the Recurrence button on the toolbar.

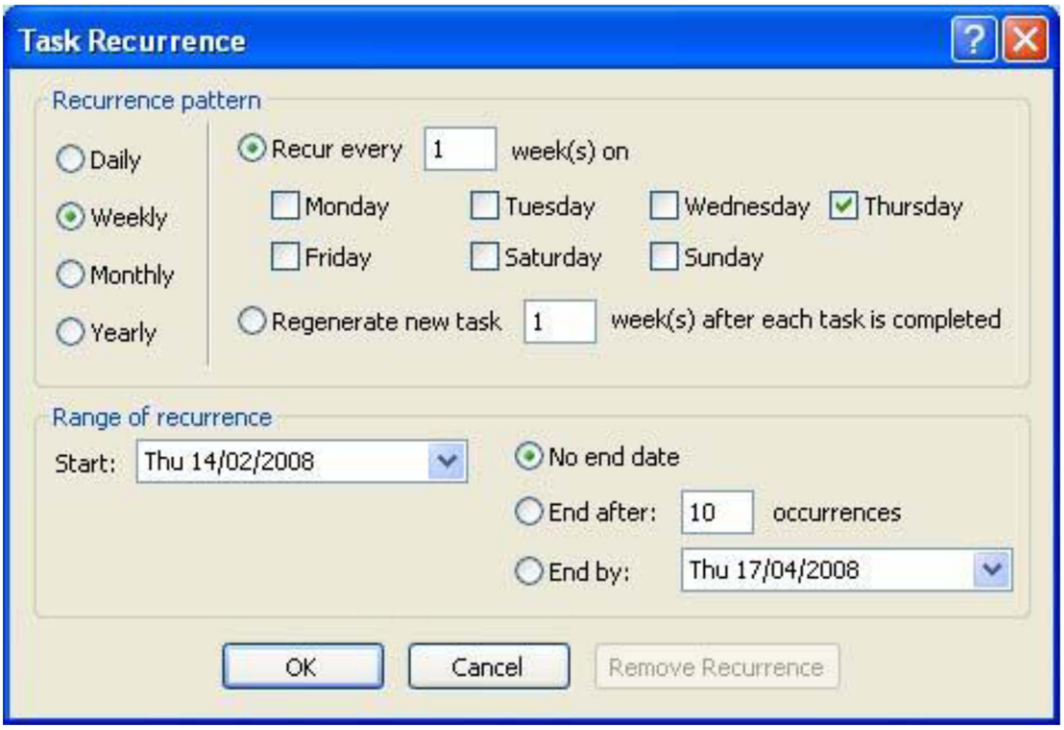


Figure 5-4: The Task Recurrence Dialog Box

Once you have designated a task as recurring, the Icon field displays the Recurring Task icon, a clipboard with the recurring task symbol, two arrows in a circle on a gray box. This symbol is similar to the recurring appointment symbol.

Method

To make a task recurring:

1. Select a task and open the Task window.\
   or

1. Create a task but do not close the Task window.
2. On the toolbar, click the Recurrence button.
3. In the Task Recurrence dialog box, in the Recurrence pattern area, in the left column, select a time period option button.
4. In the Recurrence pattern area, in the right column, select the appropriate option button or check boxes and, if necessary, fill in the required information in the appropriate text boxes.
5. In the Range of recurrence area, select the appropriate end date option button and fill in the required information.
6. Choose OK.
7. In the Task window, on the toolbar, click the Save and Close button.

Exercise

In the following exercise, you will make a task recurring.

1.	Select the *send fliers re: next month's specials…* task and open the Task window	
2.	On the toolbar, click the Recurrence button OR Select from the Action option.	*The Task Recurrence dialog box appears.*
3.	In the Recurrence pattern area, in the left column, select the Monthly option button.	
4.	In the Recurrence pattern area, in the right column, select the second option button	
5.	In the Range of recurrence area, select the End after option button, and then select the text in the text box and type **6**	
6.	Choose OK	*The Task window reappears. An information area that tells you when the task is due, when the task starts, and how long it is effective appears just below the tabs.*
7.	On the toolbar, click the Save and Close button	*The task is recurring. The task list reappears. The icon cell displays the Recurring Task icon.*

Deleting and Restoring a Task

When you are no longer responsible for a task on your task list and you have not done any work on it, you should delete the item from your list. If you delete a task in error, you can immediately restore it.

NOTE: **SINCE OUTLOOK IS A RECORD OF YOUR ACTIVITIES, YOU SHOULD NOT DELETE PARTIALLY COMPLETED AND COMPLETED TASKS. THIS CAN BE ESPECIALLY IMPORTANT WHEN AUDITORS COME BY OR WHEN IT IS TIME FOR YOUR ANNUAL PERFORMANCE APPRAISAL.**

Method

To delete a task:

1. Select the task.
2. On the toolbar, click the Delete button.

Managing Tasks

If you have many tasks, you might want to view your task list differently. As in the Mail folder, you can sort your tasks by clicking the column headers. In addition, you can filter your task list to show a subset of your tasks by clicking the Current View drop-down arrow.

The Tasks Current View drop-down list gives you numerous criteria to use to filter the messages. Table 5-3 summarizes the Tasks Current View filters.

Name	**Function**
Simple List	Shows the subject line, task type, status, and due date of all tasks.
Detailed List	Shows the Simple List with such additional details as priority, whether there are attachments, and categories.
Active Tasks	Shows only those tasks that are incomplete.
Next Seven Days	Shows only those tasks due in the next seven days.
Overdue Tasks	Shows only those tasks that are overdue.
By Category	Groups tasks by category.
Assignment	Groups tasks by who assigned them to you.
By Person Responsible	Groups tasks by who is responsible for their completion.
Completed Tasks	Shows only completed tasks.
Task Timeline	Graphically shows when each task was assigned, its duration, and its completion date.
Server Tasks	Show tasks stored on a Server typically Microsoft Exchange
Outlook Data Files	Shows Data Files
To-Do List	Show active to do list

Table 5-13: The Tasks Current View Filters

When you assign priorities to your tasks, you can decide which task to work on based on its importance and its due date. You should also track the status of a task and check it off when you complete it.

Setting the Priority for a Task

While it is important that you complete all tasks punctually, some tasks are more important than others, and you should work on them first. Outlook lets you set the priority on tasks so you can quickly evaluate how to best use your time. You can use the Task window to set your task priority shown in Figure 5-5. You can select Low, Normal or High priority, Normal is selected by default. Or, if you already have a task on your list, you can display the list in a detailed view and add a priority symbol to the task by clicking the Priority column header, The symbol for low priority is a blue arrow pointing down and for high priority is a red exclamation point. Normal priority has no symbol.

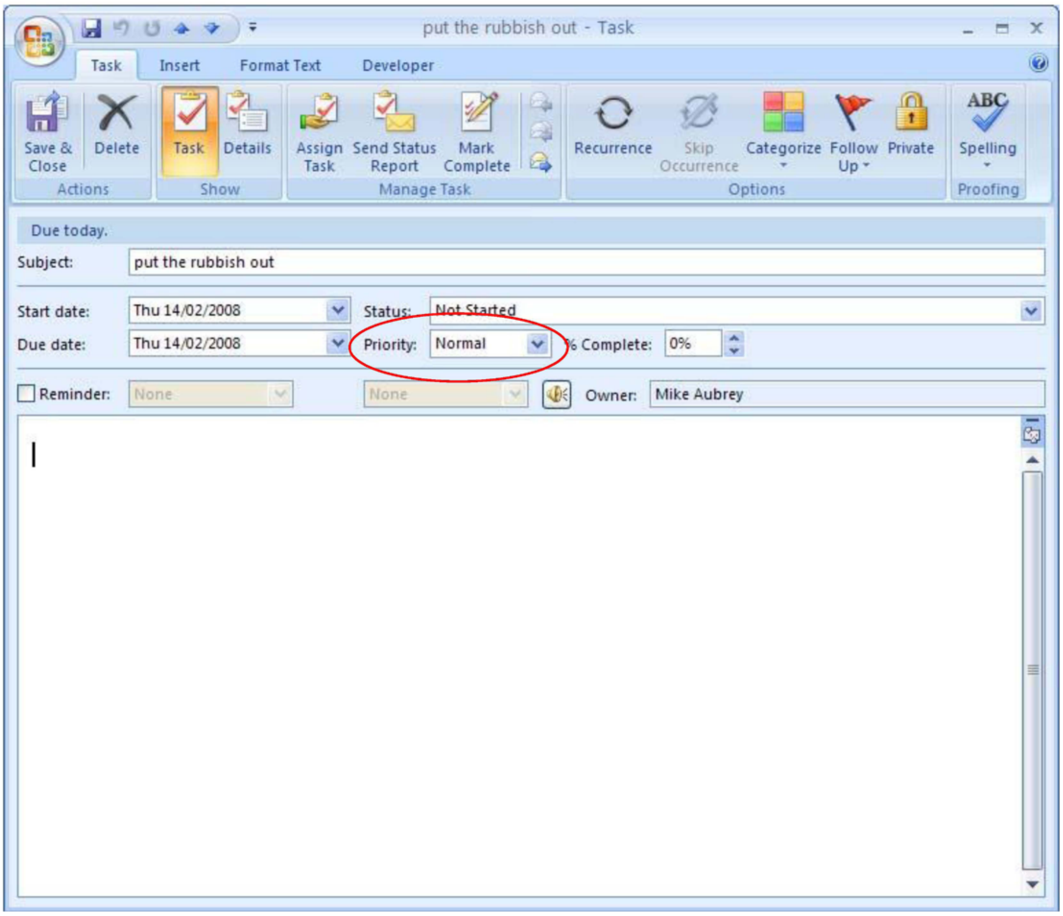


Figure 5-5: Setting Priority

***NOTE:* THE PRIORITY COLUMN HEADER IS NOT VISIBLE WHEN YOU FILTER YOUR CURRENT VIEW AS SIMPLE LIST OR AS TASK TIMELINE.**

Method

To set the priority for a task:

Task window method

1. Select a task and open the Task window.

   or

1. Create a task but do not close the Task window.
2. In the Task window, click the Priority drop-down list box, and then select a priority.
3. On the toolbar, click the Save and Close button.

Detailed list method

1. In any task list view that shows the Priority column, click the Priority column cell for the task.
2. From the drop-down list, select a priority.
3. Click anywhere on the task list.
   or
4. Press **ENTER**

Exercise

In the following exercise, you will set the priority for several tasks.

1.	Open the *buy copy paper* Task window	
2.	Click the Priority drop-down list box, and then select High	
3.	On the toolbar, click the Save and Close button	*The task list reappears.*
4.	On the toolbar, click the Current View drop-down list arrow, and then select Active Tasks	*A red exclamation point appears in the Priority column cell of the* ***buy copy paper*** *task.*
5.	Click the priority column cell for the *get info on food festival* task	*A drop-down list appears.*
6.	Select High	*A red exclamation point appears in the Priority column.*
7.	Click anywhere on the task list	*The priority is saved.*

Tracking a Task's Status and Marking a Task Completed

Each time you work on a task, you should track its status on the Details page of the Task window, shown in Figure 5-6. You can enter such details as how many hours the task lasted, who to bill, who you contacted, and so forth on this page. You can show that a task is in progress and approximate how close to completion you are on the Task page.

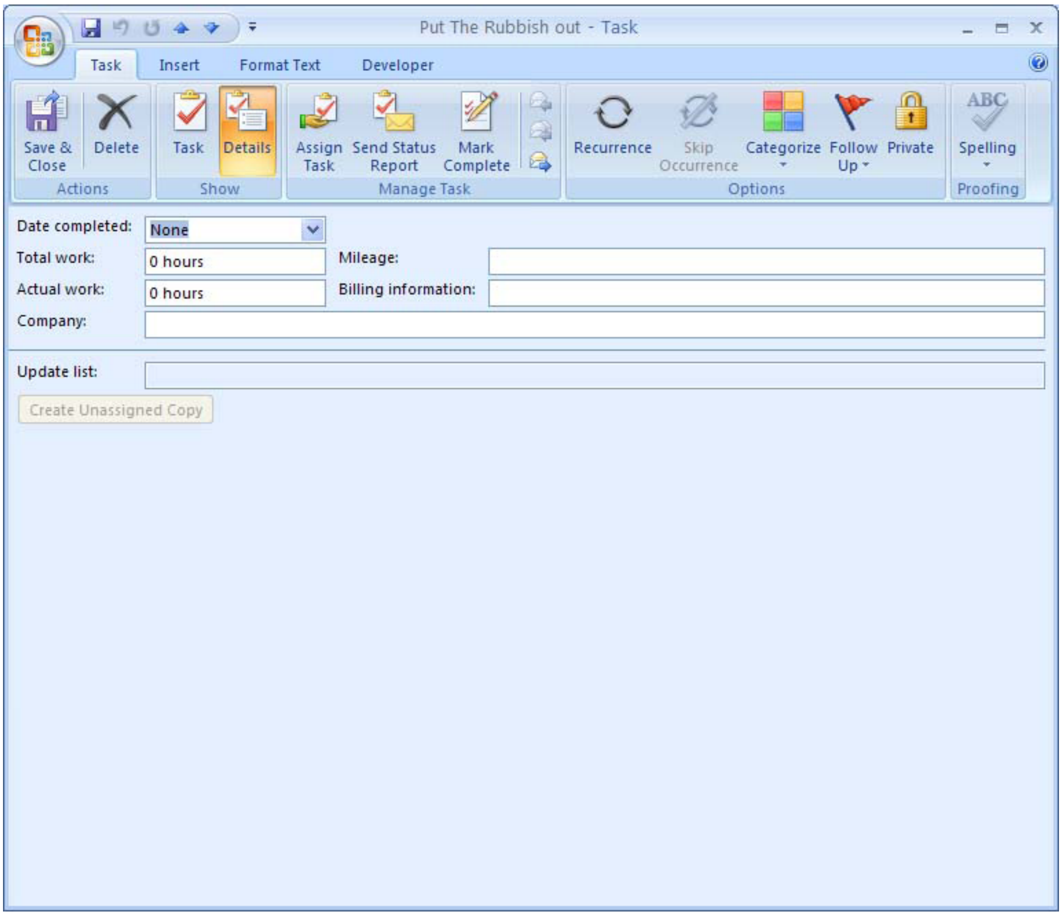


Figure 5-15: The Details Page of the Task Window

When you finish a task, you should mark it as completed so that it no longer appears on your active tasks list. You can simply check it off on your TaskPad or task list using the check box in the complete column or you can mark it in the Task window. Figure 5-7 shows the complete column header. You can also set the % completed of the task using the new task window

Figure 5-16: The Complete Column Header

Note: The Complete column header is only visible when you filter your Current View as Simple List.

Method

To track a task's details and status:

1. Open the task window.
2. On the Task page, click the Status drop-down list box, and then select a status.
3. In the % Complete spin box, click a spin arrow or enter a percentage.
4. Select the Details tab.
5. On the Details page, enter the desired details in the appropriate text boxes.
6. On the toolbar, click the Save and Close button.

To mark a task completed:

1. On the TaskPad or on the task list in Simple List view, select the Complete check box for the completed task.
   or
2. In the Task window, on the Task page, click the Status drop-down list box, and then select Completed.
3. On the toolbar, click the Save and Close button.

Exercise

In the following exercise, you will track a task's status and you will mark tasks completed.

1.	Open the Calendar folder	
2.	On the TaskPad, select the *buy copy paper* Complete check box	*A check appears in the Complete check box and a line appears through the subject.*
3.	Open the Tasks folder	
4.	Click the Current View drop-down list arrow, and then select Simple List	
5.	On the task list, select the *order new tablecloths* Complete check box	*A check appears in the Complete check box and a line appears through the subject and the due date.*
6.	From the task list, open the *call suppliers about discounts for bulk orders* Task window	
7.	On the Task page, click the Status drop-down list box, and then select In Progress	
8.	In the % Complete spin box, type **10%**	
9.	On the toolbar, click the Save and Close button	*The task list reappears.*
10.	From the task list, open the *get info on food festival* Task window	
11.	On the Task page, click the Status drop-down list box, and then select Completed.	*The text in the % Complete text box becomes 100%.*
12.	Select the Details tab	*The Details page appears.*
13.	In the Total work text box, type **20 minutes**	
14.	In the Actual work text box, type **20 minutes**	
15.	In the Mileage text box, type **none**	
16.	On the toolbar, click the Save and Close button	*The task list reappears. A check appears in the Complete check box and a line appears through the subject and the due date.*

Using Task Timeline View

Filtering the Current View as Task Timeline, shown in Figure 5-8, shows you, your task list in timeline format. When you view your tasks with this filter, you can visually analyze which tasks you must work on to complete everything in a timely fashion. You can open the Task window from this view to enter data.

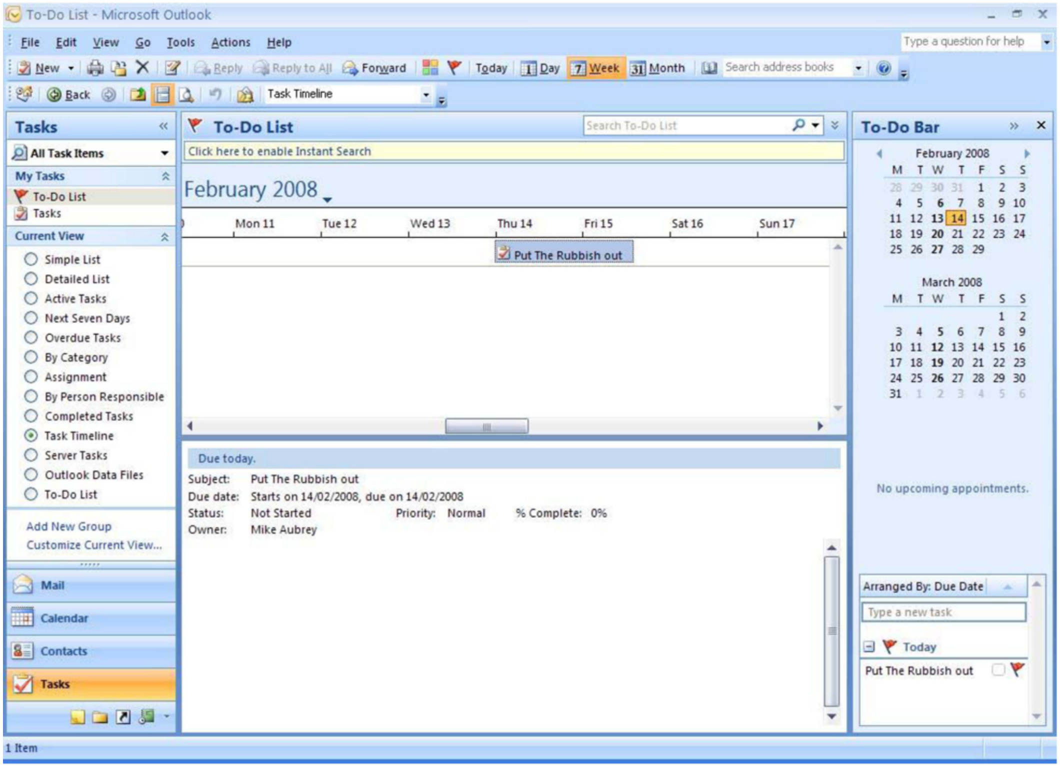


Figure 5-17: The Tasks Folder in Task Timeline View

Method

To use Task Timeline view:

1. On the toolbar, click the Current View drop-down arrow, and then select Task Timeline.
2. Examine the timelines.
3. If desired, select a task, and then double-click it.
4. In the Task window, make desired changes.
5. On the toolbar, click the Save and Close button.

Exercise

In the following exercise, you will use Task Timeline view.

1.	On the toolbar, click the Current View drop-down arrow	*The drop-down list appears.*
2.	Select Task Timeline	*The task list appears in Task Timeline view.*
3.	Examine the list	
4.	Return the Current View to Simple List	

Assignment

1. Add **hire assistant chef** to your task list. Set the priority as high.
2. Add **make kitchen clean-up check list** to your task list.
3. Add **send out Bristol and West Restaurant Association mailing** to your task list. Set this up as a task that recurs monthly on the fifth of each month. Show this as a one-year commitment.
4. You have an hour appointment to interview Barry Wise tomorrow morning for the assistant chef position. Show the *Hire assistant chef* task as in progress and 25 percent complete.
5. Change the *collect recipes for culinary course* task to read **get recipes from Charlotte for culinary course**
6. Delete the *Make signs for Balloon Fiesta stall* task, and then restore it.
7. Examine your task list in Task Timeline view. Then, view your task list in Next Seven Days view.

Section 6 Keeping a Journal and Utilising Notes

Objectives

At the completion of this lesson you will be able to:

- Tracking Activities
- Working with Notes

Topics

Tracking Activities
Recording Activities Automatically
Setting Shortcut Opening Options and Using a Journal Entry as a Shortcut
Working with Notes
Writing a Note
Opening and Editing a Note
Organising Notes
Changing Icon Size
Assignment

Tracking Activities

The Journal is where you record all documents on which you work. Figure 6-1 shows a sample journal viewed by entry type in month view. The timeline shows e-mail and Word documents and when they were opened.

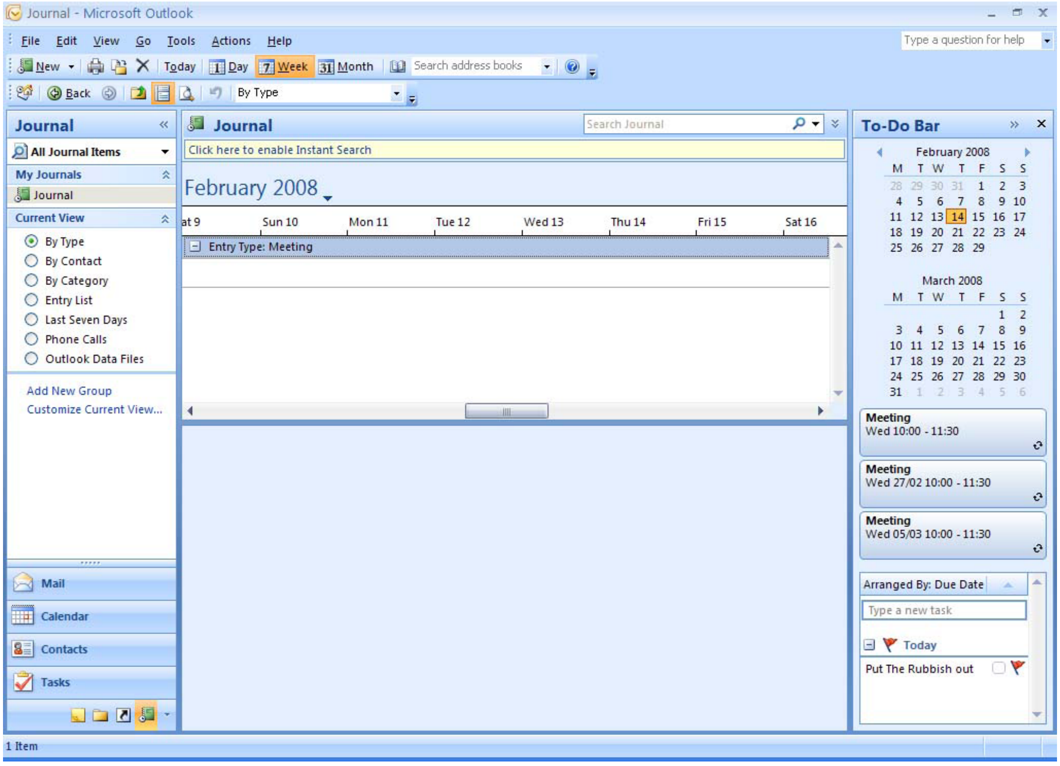


Figure 6-18: A Sample Journal Filtered by Entry Type in Day View. Below – The journal tracks your Office files so that when you double click the icon it opens up for editing/reading.

You can set up the Journal to record your Microsoft Office activities automatically. You can also list your other activities manually, whether you open a non-Office document or you want to record a conversation, an appointment, a contact, or anything else of importance.

You might need to verify when you worked on a document or talked with a colleague. In such a case, you can use your Journal to find your activity. Several filters show timelines that emphasize the date and duration of the contact, while the remaining filters document the quantity of activity. You can change whether the timeline displays a day, a week, or a month by clicking the Day, Week, or Month buttons on the toolbar, as you did in the Calendar folder. If you want to open a document that is listed in your Journal, you can open it directly from the Journal listing.

The Journal Current View drop-down list gives you numerous criteria to use to filter the activities. Table 6-1 summarizes the Journal Current View filters.

Name	**Function**
By Type	Group activities by application type in timeline format.
By Contact	Groups activities by contact in timeline format.
By Category	Groups activities by category in timeline format.
Entry List	Lists all activities recorded. Shows the date, duration, contact, and category.
Last Seven Days	Shows the entry list for the last seven days.
Phone Calls	Lists phone calls.
Outlook Data Files	Lists Data Files

Table 6-14: The Journal Current View Filters

Table 6-15 summarizes the context-sensitive Journal toolbar buttons.

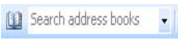
Button	**Name**	**Function**
	New Journal	Opens the New Journal Entry window so you can create a new activity. The drop-down arrow gives you access to the New windows for the other Outlook features.
	Print	Prints your journal
	Move to Folder	Move journal to another folder
	Delete	Delete Journal Entry
	Today	Displays entries for today on timeline
	1 Day	Displays one day on the timeline.
	1 Week	Displays one week on the timeline.
	1 Month	Displays one month on the timeline.
	Search Address book	Searches contacts list

Table 6-15: Summary of the Journal Toolbar Buttons

Recording Activities Automatically

You set up the Journal to record your activities automatically on the Journal page of the Options dialog box, shown in

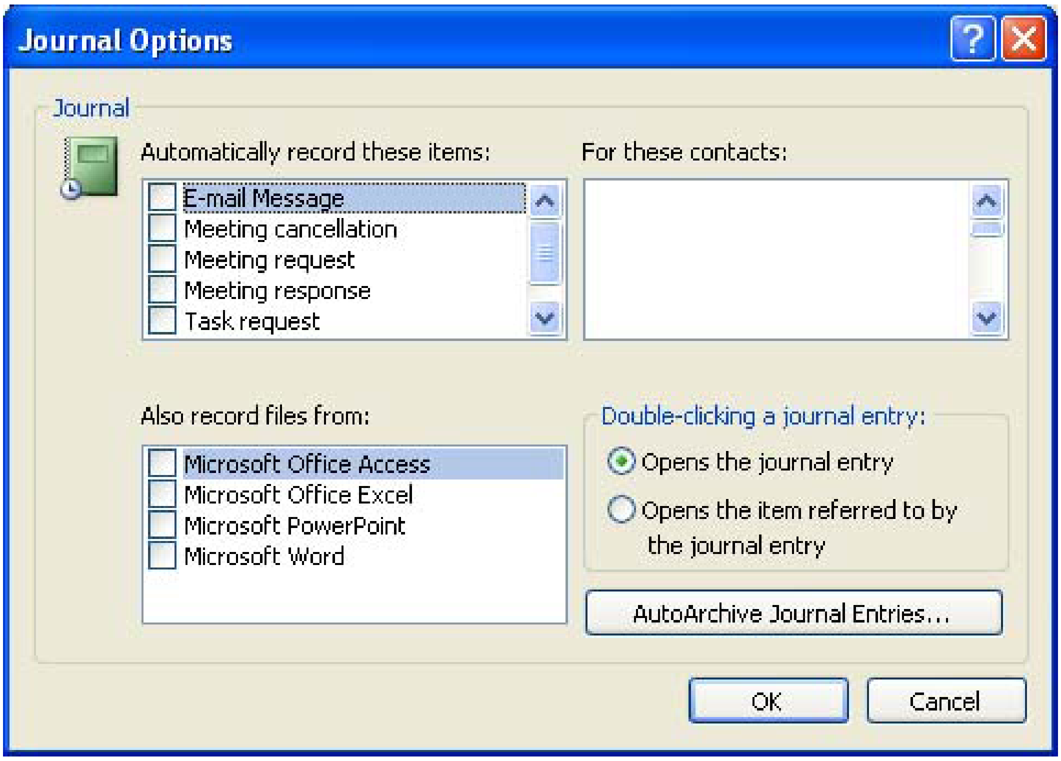


Figure 6-19: This page governs recording e-mail messages, meetings, tasks assigned to others, and activities with contacts as well as documents you open in the Microsoft Office.

Figure 6-19: The Journal Page of the Options Dialog Box

Method

To record activities automatically:

1. From the Tools menu, choose Options.
2. In the Options dialog box, select the Journal Options button.
3. On the Journal page, in the *Automatically record these items:* list, select the appropriate check boxes.
4. In the *For these contacts:* area, select the appropriate check boxes.
5. In the *Also record files from:* area, select the appropriate check boxes.
6. Choose OK.

Exercise

In the following exercise, you will automatically record activities in your Journal.

1.	Open the Journal folder	*The Journal appears in By Type view.*
2.	From the Tools menu, choose Options	*The Options dialog box appears.*
3.	Click the Journal button.	*The Journal Options dialog box opens.*
4.	In the *Automatically record these items:* list, select all the check boxes	
5.	In the *For these contacts:* list, select the box	
6.	In the *Also record files from:* area, select all the check boxes	
7.	Choose OK	*The Journal reappears.*
8.	Open Microsoft Word	
9.	From the **Data** folder on your hard drive, open the document **Journal.doc**	
10.	Close the document and exit from Word	
11.	Open the Journal	*An Entry Type for Microsoft Word appears on the timeline.*
12.	Click the + to the left of Entry Type: Microsoft Word	*The Entry Type expands to show your Microsoft Word activity.*

Setting Shortcut Opening Options and Using a Journal Entry as a Shortcut

Suppose you are looking for a document you worked on a week ago and you can no longer recall its name. You can open items you tracked in your Journal to find the document you want.

The way you set up the Journal page of the Options dialog box determines whether you open the document directly or you open the Journal Entry window and then the document. By default, double-clicking opens the Journal Entry window.

Method

To set shortcut opening options:

1. From the Tools menu, choose Options.
2. On the Preferences page of the Options dialog box click the Journal button.
3. In the *Double-clicking a journal entry:* area, select an option button.
4. Choose OK.
5. Choose OK.

To use a Journal entry as a shortcut:

1. Double-click the Journal entry.
2. If necessary, in the Journal Entry window, double-click the shortcut in the large text box at the bottom of the window.

Exercise

In the following exercise, you will set shortcut opening options and you will use a Journal entry as a shortcut.

1.	Change the view to Last Seven Days	
2.	If necessary, position the double-headed mouse pointer over the border that separates the Subject and the Start column headers, and then drag the border to the right	*The Subject column becomes wider, allowing you to see the whole drive path.*
3.	In the Subject column, double-click **C:\Data\Journal.doc**	*The Journal.doc Journal Entry window appears.*
4.	In the large text box at the bottom of the window, double-click the **Journal.doc** shortcut	*Word loads and the document opens.*
5.	Close the document and exit from Word	*The Journal Entry window reappears.*
6.	Close the Journal Entry Window	*The Journal reappears.*
7.	From the Tools menu, choose Options then click the Journal button.	*The Journal page of the Options dialog box appears.*
8.	In the *Double-clicking a journal entry:* area, select the *Opens the item referred to by the journal entry* option button	
9.	Choose OK	*The Options dialog box is shown again.*
10.	Choose OK	
11.	In the activity list, double-click **C:\Data\Journal.doc**	*The document opens.*
12.	Close the document and exit from Word	*The Journal reappears.*

Working with Notes

Outlook's Notes folder lets you write casual sticky notes to yourself that you can leave on-screen as a reminder. If you have notes related to an appointment, a contact, or a task, you should write such notes in the text boxes provided in the entry windows. You can write and edit the sticky notes and delete them when you no longer need them.

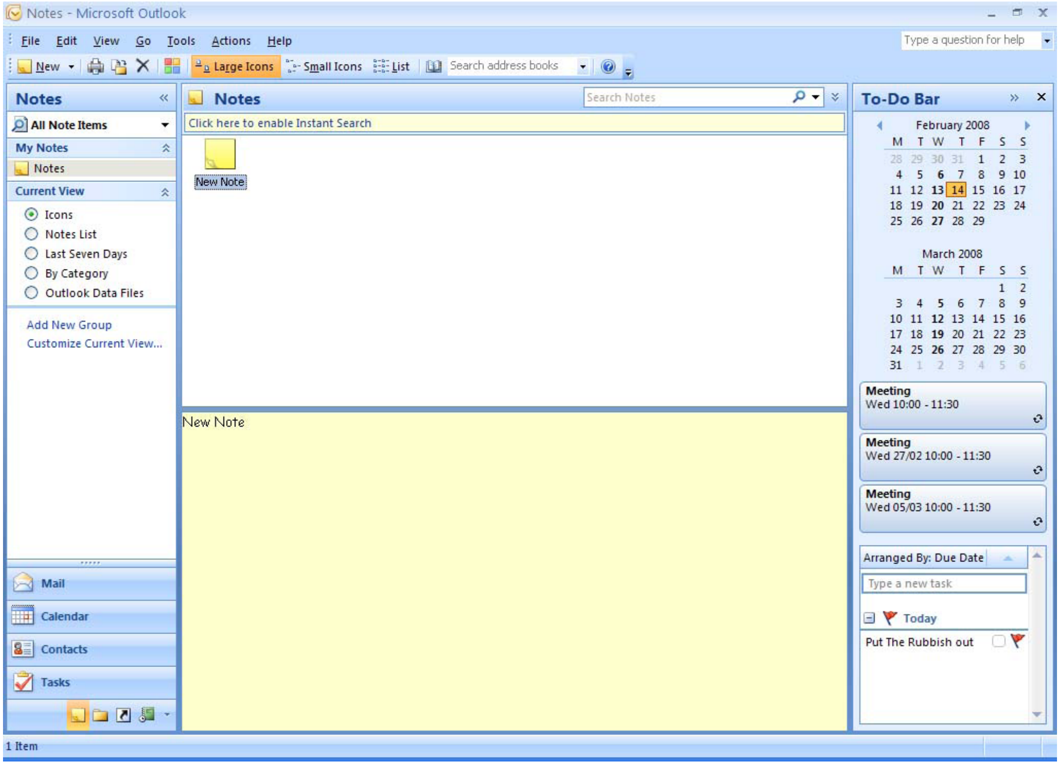


Figure 6-2: The notes screen

Table 6-16 describes the functions of the Notes toolbar buttons.

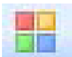
Button	Name	Function
	New Note	Opens a New Note so you can create a new memo. The drop-down arrow gives you access to the New windows for the other Outlook features.
	Print	
	Move to folder	
	Delete	
	Categorise	
	Icons	Displays the icons as large, small, or in a list.
	Icons	Displays the icons as large, small, or in a list.
	Show as list	Displays the Icons as a list
	Search Address Books	Allows you to search your contacts list

Table 6-16: The Notes Toolbar Buttons

You filter the Notes using the Current View drop-down list. Table 6-4 lists the built-in filters.

Name	**Function**
Icons	Displays an icon and the full text of each note.
Notes List	Lists each note and lets you sort by subject, date created, and category.
Last Seven Days	Lists the notes created in the last seven days.
By Category	Groups notes by category.
By Colour	Groups notes by colour.
Outlook Data Files	By Data Files

Table 6-17: The Notes Current View Filters

Writing a Note

You write notes in the Notes folder. When you click the New Note button, you see an untitled note that has the current date and time at its bottom. When you finish writing a note, as shown in Figure 6-4, you click its Close button to store it in the Notes folder.

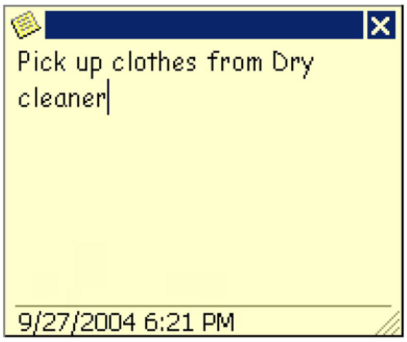


Figure 6-20: A Note

Method

To write a note:

1. In the Notes folder, click the New Note button.
   or

1. From the Note menu, choose New Note.
2. On the note, type your text.
3. Click anywhere outside the note to leave the note open.
   or

4. Click the Close button to close the note.

Exercise

In the following exercise, you will write notes.

1.	Open the Notes folder	*Your notes appear.*
2.	On the toolbar, click the New Note button	*An untitled note appears.*
3.	On the note, type **Pick up clothes from dry cleaner.**	
4.	Click outside the note	*The note stays open and appears in the information viewer and on the taskbar.*
5.	From the Note menu, choose New Note	*An untitled note appears.*
6.	On the note, type **Ask Charlotte to attend the interview tomorrow.**	
7.	Click the Close button	*The note is closed and appears in the information viewer.*
8.	On the taskbar, click the dry cleaner note	*The note becomes active.*
9.	Close the note	

Opening and Editing a Note

A note must be open to edit it. You use the same editing techniques that you use in Word or in your e-mail.

Method

To open a note:

1. Double-click the note.

To edit a note:

1. If necessary, open the note.
2. Make the changes.
3. If desired, close the note.

Exercise

In the following exercise, you will open and edit a note.

1.	Double-click the note that says, *Ask Charlotte to attend the interview tomorrow.*	*The note opens.*
2.	Between the word *Charlotte* and the word *to* type **today**	*The word is inserted.*
3.	Close the note	

Organising Notes

Besides sorting and viewing your notes just as you do other Outlook data, you can colour code your notes and you can change the icon size to read your notes better.

Colour Coding a Note

When you color code your notes by subject, category, project, or other criteria, you can quickly identify related notes when you are looking at the notes in Icon view. You change the colour of a note when the note is open.

Method

To color code a note:

1. Open the note.
2. Right click the note icon.
3. From the drop-down menu, choose Categorise.
4. From the submenu, choose a colour.
5. If desired, close the note.

Exercise

In the following exercise, you will colour code a note.

1.	Open the *Ask Charlotte today to attend the interview tomorrow* note	
2.	Right click the note icon	*A drop-down menu appears.*
3.	Choose Categorise	*A submenu appears.*
4.	Choose red	*The colour of the note changes to red.*
5.	Close the note	
6.	Change the Current View to By Colour	*The notes are grouped by colour.*
7.	Expand the red notes	*The* ***Ask Charlotte today to attend the interview tomorrow*** *note appears.*
8.	Collapse the notes, and then change the Current View back to Icons	

Changing Icon Size

You can change the size of the note icons just as you change icon size in Windows Explorer. Outlook provides three buttons on the toolbar that determine icon size and placement—Large Icons, Small Icons, and List—shown in Figure 6-21.

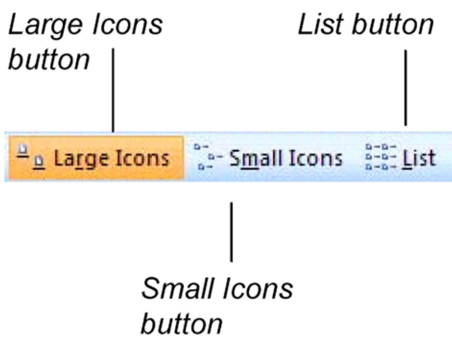


Figure 6-21: The Icon Buttons

The large icon size is the default size. When you click the Large Icon button, the notes are arranged horizontally across the information viewer with the text below each icon. When you click the Small Icon button, the icons are arranged horizontally with the text to the right of each icon. Clicking the List button gives you small icons arranged in a vertical list with the text to the right of each icon.

Method

To change icon size:

1. On the toolbar, click an Icon button.

Exercise

In the following exercise, you will change icon size.

1.	On the toolbar, click the Small Icons button	*The icons become small and display the text to the right of the icons.*
2.	On the toolbar, click the List button	*The icons appear in a vertical list with the text to the right of the icons.*
3.	On the toolbar, click the Large Icons button	*The icons become large and display horizontally with the text below the icons.*

Assignment

1. Reset the Journal so that it no longer automatically records your e-mail, meeting, and task-related activities. Set double-clicking to open the Journal entry.
2. Add a fax from Freddie Montra to your Journal. Freddie sent you three assistant chef referrals.
3. View your Journal by phone calls. Add a call to Freddie Montra to thank him for the fax.
4. View your Journal by type. Expand the view to see all your phone calls.
5. From the **Data** folder, open the Word document **Specials List.doc**. Then close it. Find the Journal entry for this Word document. Use the Journal entry as a shortcut to reopen the document.
6. Close **Specials List.doc**, and then exit from Word.
7. Write a note to invite your sister to visit for the Balloon Fiesta. Change the text to include her family.
8. Make all the personal notes blue and the business notes pink.
9. Change the Current View to By Colour. Expand the Notes list so you can see all notes.
10. Change the Current View to Icons. Change to small icons.
11. Exit and log off from Outlook.

Appendix A Additional Features in Outlook 2007

Objectives

At the completion of this lesson you will be able to:

- Consider new Outlook 2007 features.

Topics

Word as E-Mail Editor
The Office Ribbon
Autosuggest
Outlook Colour Coded Category Labels
Send/Receive Groups
Editing and adding Mail accounts
Views in Outlook 2007
Miscellaneous Features in Outlook 2007

Word as E-Mail Editor

In earlier versions of Outlook you could select Word as an e-mail editor. Outlook 2007 now has many of the word editing features and commands built in to make it a comprehensive email editor. However more feature and commands are available if you install Microsoft Word 2007 as well as Outlook 2007 (see table 1-1).

Feature	Without Word 2007 installed	With Word 2007 installed
Message thread shading in open messages and the Reading Pane	Yes	Yes
Panning through messages on Tablet PCs	Yes	Yes
Search results highlighting for Instant Search	Yes	Yes
New and improved fonts	Yes	Yes
Smart tag recognition	Yes	Yes
New Save as options	Yes	Yes
Quick Styles gallery	Yes	Yes
Themes	No	Yes
Automatic formatting of bulleted and numbered lists	No	Yes
Automatic formatting of tables	No	Yes
Proofing tools like the dictionary and thesaurus.	No	Yes
SmartArt graphics drawing, charting, and diagramming tools	No	Yes
Captions	No	Yes
Equation Builder	No	Yes
WordArt	No	Yes

Table 1-1 – Outlook feature guide – with and without Word installed

The Office Ribbon

The Ribbon is a new feature is Office 2007 and is featured to some degree in each package e.g. Outlook, Excel, Word etc. The Ribbon has been designed to replace the old File, Edit etc menu system and is more intuitive i.e. commands are now where you would expect to find them.

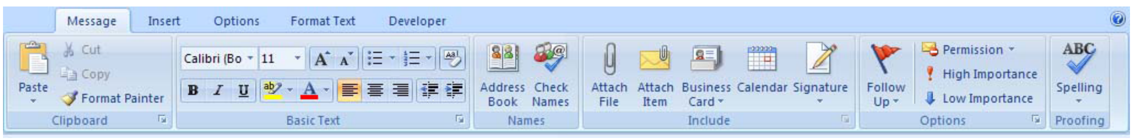


Figure 1-1: Example of the Office 2007 Ribbon

Autosuggest

Outlook 2007 will ***Autosuggest*** addresses as you type in recipient names, drawing from a list of the recipients you send messages to most often.

Microsoft Outlook 2007 now remembers and stores the e-mail addresses you type in the **From**, **To**, **Cc**, and **Bcc** boxes. When you begin entering a previously typed e-mail address, Outlook automatically recognises it and offers to complete the text for you, as shown in Figure 1-22. To accept a suggestion, all you have to do is press the ENTER key.

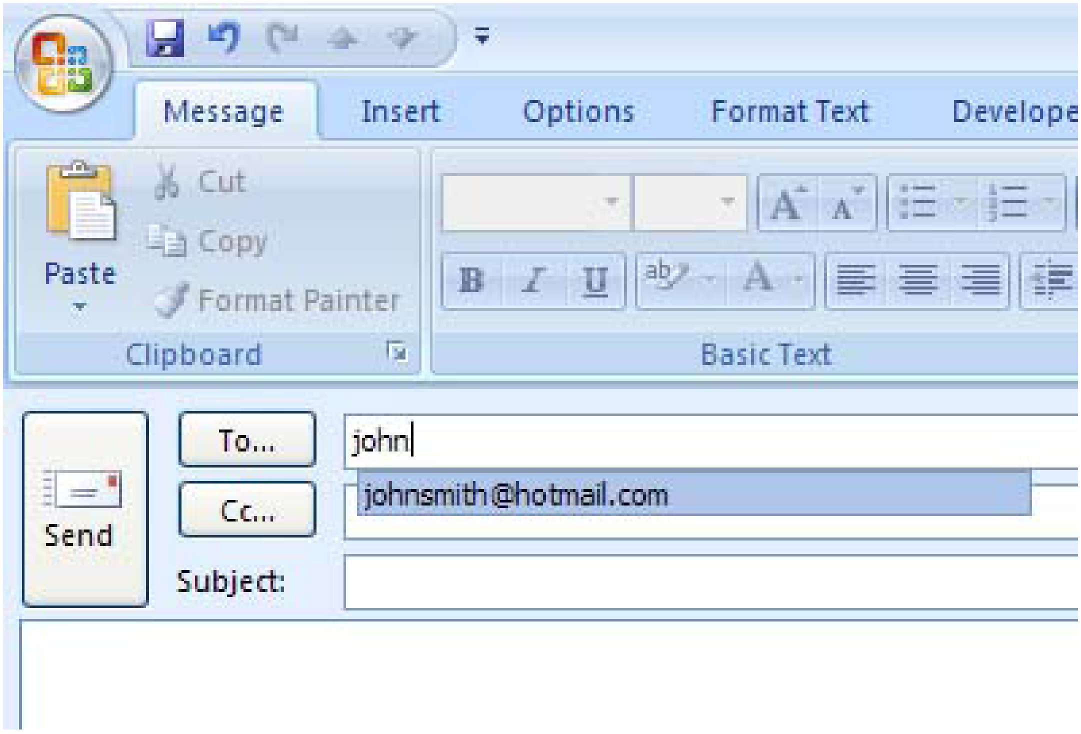


Figure 1-22: The AutoSuggest prompt

For e-mail addresses with the same first three characters, Outlook provides all applicable suggestions in a drop-down box. In Figure 1-22 you might want to press the DOWN ARROW key to select the e-mail address you want, and then press ENTER. If stored addresses exceed seven, a scroll bar will appear. To delete stored e-mail addresses from the drop-down box, simply use the arrow keys to select the e-mail address you want to delete, and then press DELETE.

METHOD

To turn off automatic completion of e-mail addresses

1. On the **Tools** menu, click **Options**.
2. Click **E-mail Options**, and then click **Advanced E-mail Options**.
3. Under **When sending a message**, clear the **Suggest names while completing To, Cc, and Bcc fields** check box. On the Standard toolbar, click the Open button.

Outlook Colour Coded Category Labels

Outlook 2007 includes a Colour coding feature. You can now Colour calendars in the day, week or month view either manually or with an automatic formatting rule.

Figure 1-3 shows the ***Colour Label*** picker menu.

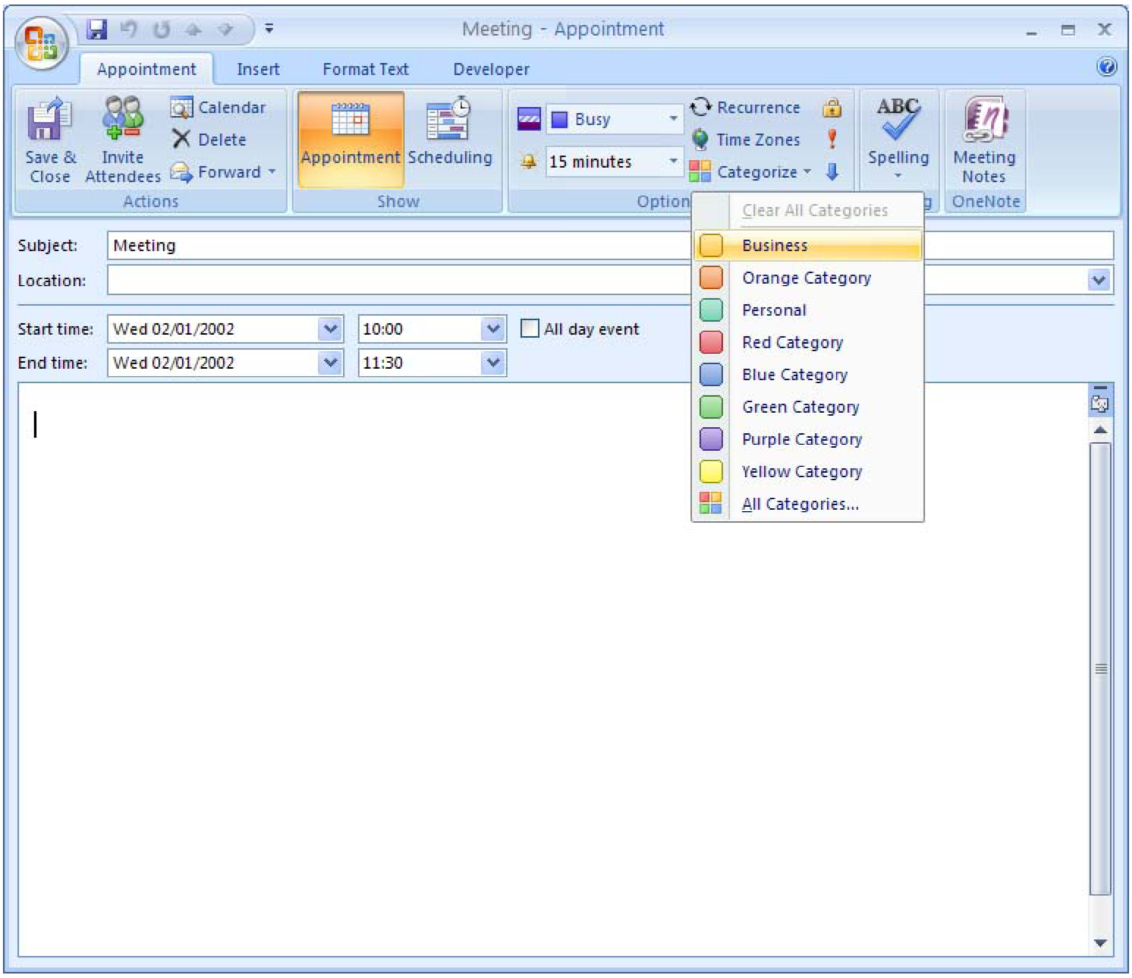


Figure 1-3: The Colour Labels picker

Method

To use Colour Labels:

1. Select the item to Categorise.
2. From the Edit menu, choose Categorise.
3. Select a Colour.

Editing Colour Labels

The Edit Labels command lets you change the text associated with each Colour. (**Note:** you can change the available Colours.) For example, in Figure 1-3 "Meeting can be set to Yellow" has been changed to "Business".

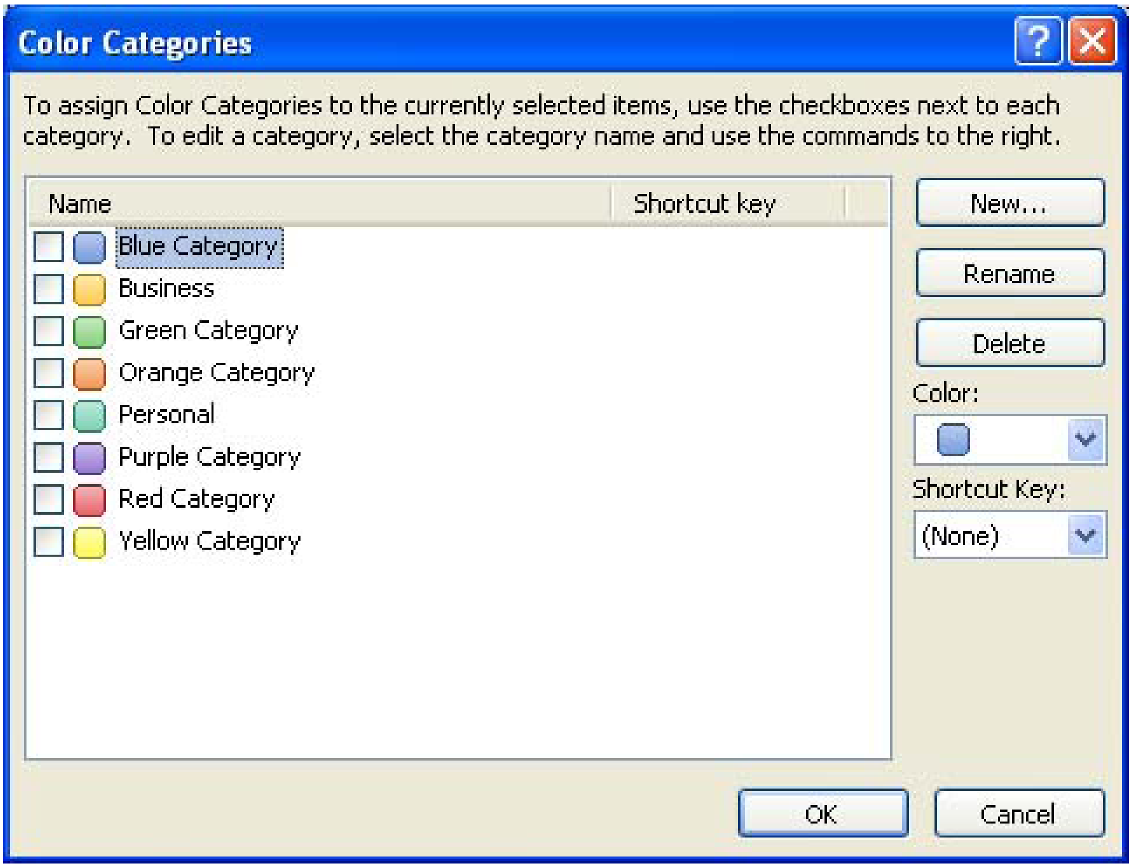


Figure 1-4: The Edit Calendar Labels dialog box

Method

To Edit Colour Labels:

1. Select Edit, Categorise.
2. Select All Categories from the Colour Label Colour menu.
3. In the Edit Calendar Labels dialog box click next to a Colour you want to edit the name of.
4. Type in the value box your new label.
5. Click OK

Note: You can pick any colour you wish and give any name to your category. You can also assign shortcut keys to your chosen category allowing you to quickly label any appointment, task etc.

Tips for using the Colour labels:

- If you use the Edit Labels feature to change the text for a label, be sure to keep a list of the original label text and the new text. You'll need the original text if you want to filter or group by the Label field.
- Outlook 2007 extends the automatic formatting feature to the Day/Week/Month view using the Colour labels. Right-click anywhere in a day/week/month view calendar, and choose Automatic Formatting. For example, you can use automatic formatting to create a rule that looks for every appointment where the subject contains "birthday" and set those appointments to use the purple Birthday Colour.
- To apply labels in bulk to existing appointment items without using automatic formatting, create a new table view and set it to group by the Label property. You can then drag items from the Label: None group to the group whose label you want to apply to those items. Remember that table views use the built-in label names and ignore the names you may have customised, so keep that list of your customisations handy.

Send/Receive Groups

In Outlook, mail accounts are organised into groups. When you edit these groups, at the basic end you can specify how often outlook checks on the server for messages (or dials up if stand alone). At the more complex end, you can optimise the groups so that certain accounts are collected when you Outlook does a standard send/receive.

Occasionally you should check the Send/Receive group settings to make sure your accounts are organised the way you want. Use **Tools | Send/Receive | Send/Receive Settings | Define Send/Receive Groups**. In particular, if you use Exchange Server with an offline folders file, you can configure which folders are available offline and whether Outlook synchronizes when you exit.

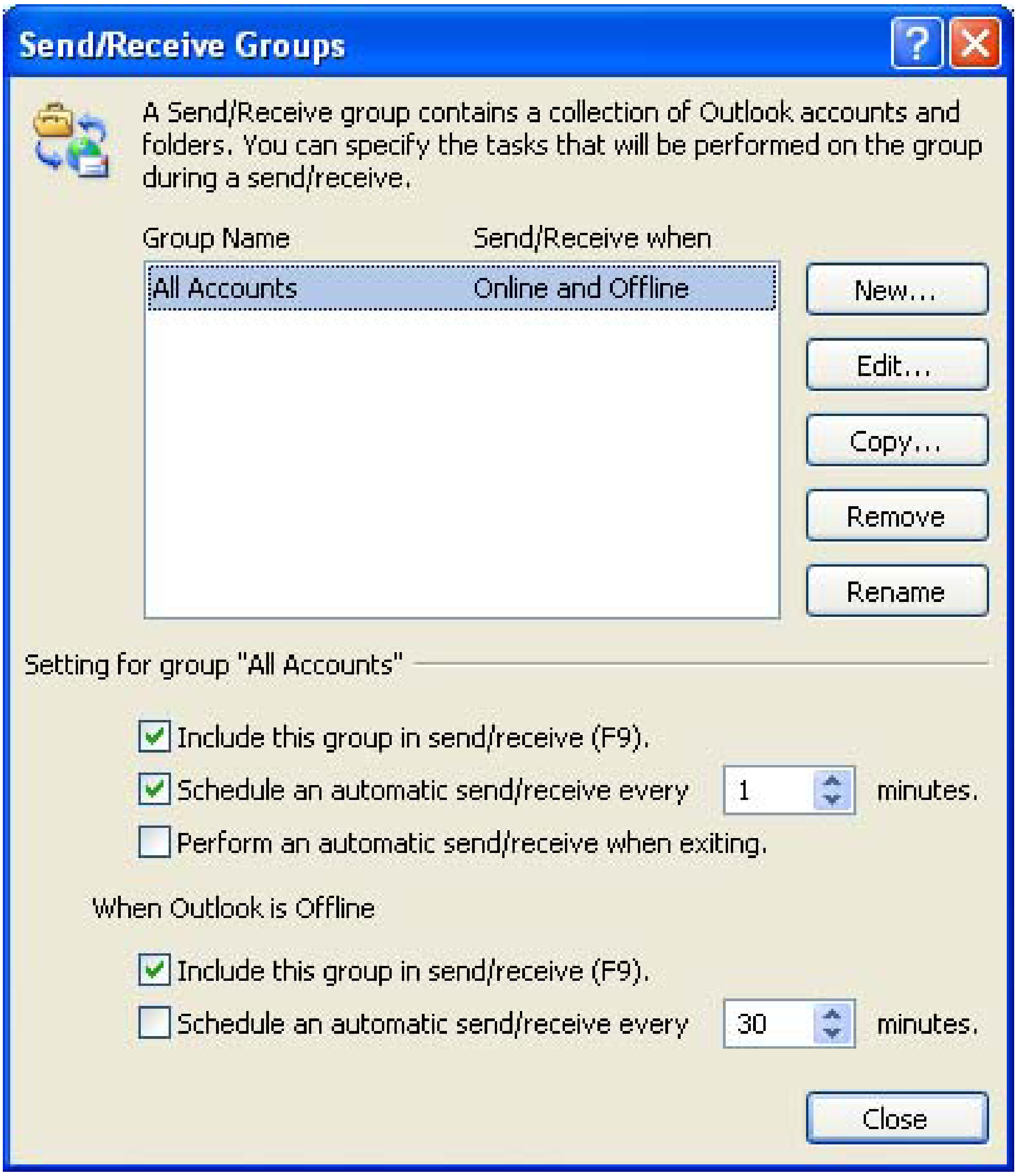


Figure 1-5: The Send/Receive Groups dialog box

Editing and adding Mail accounts

This aspect has undergone change in this version. The Edit E-Mai Accounts operator or wizard replaces the **Tools | Services** configuration settings for Outlook 97 and Corporate/Workgroup mode in Outlook 98 and 2000 and replaced the **Tools | Accounts** dialog in ***Internet Mail Only*** mode in Outlook 98 and 2000. The necessary settings are no longer concentrated in one location.

The reasoned effect of these major changes is that Outlook 2007 eliminates the distinction between Corporate/Workgroup and Internet Mail Only modes that made supporting Outlook 98 and Outlook 2000 so difficult. Using a new account management interface, a user can connect Outlook to a combination of accounts from these types of servers:

- POP or IMAP
- HTTP (so far for Hotmail and MSN only)
- Exchange Server
- Other servers supported via MAPI transports

Outlook 2007 also overhauls the concept of synchronizing with an Exchange Server, introducing Send/Receive groups that apply not just to Exchange accounts, but to all mail accounts. Users will be able to build account groups that download headers only, headers + message bodies, or entire messages including attachments from any combination of accounts. Filtering will apply not just to Exchange accounts, but also to other mail accounts. All send/receive operations will support progress dialogs.

Managing Accounts

In Outlook 2007, you manage mail accounts, add or delete address books, and change the default delivery location with the **Tools | Account Settings** wizard (first step shown in Figure 1-6). To add, remove, compact or add passwords to Personal Folders files, use **File | Data File Management**.

To change the settings formerly found in **Tools | Services | Addressing**, such as the name resolution order, choose **Tools | Address Book**, then **Tools | Options**. To change the sort order for the Outlook Address Book, choose **Tools | E-mail Accounts | View or change existing address books or directories**, select the Outlook Address Book, and then click **Change**.

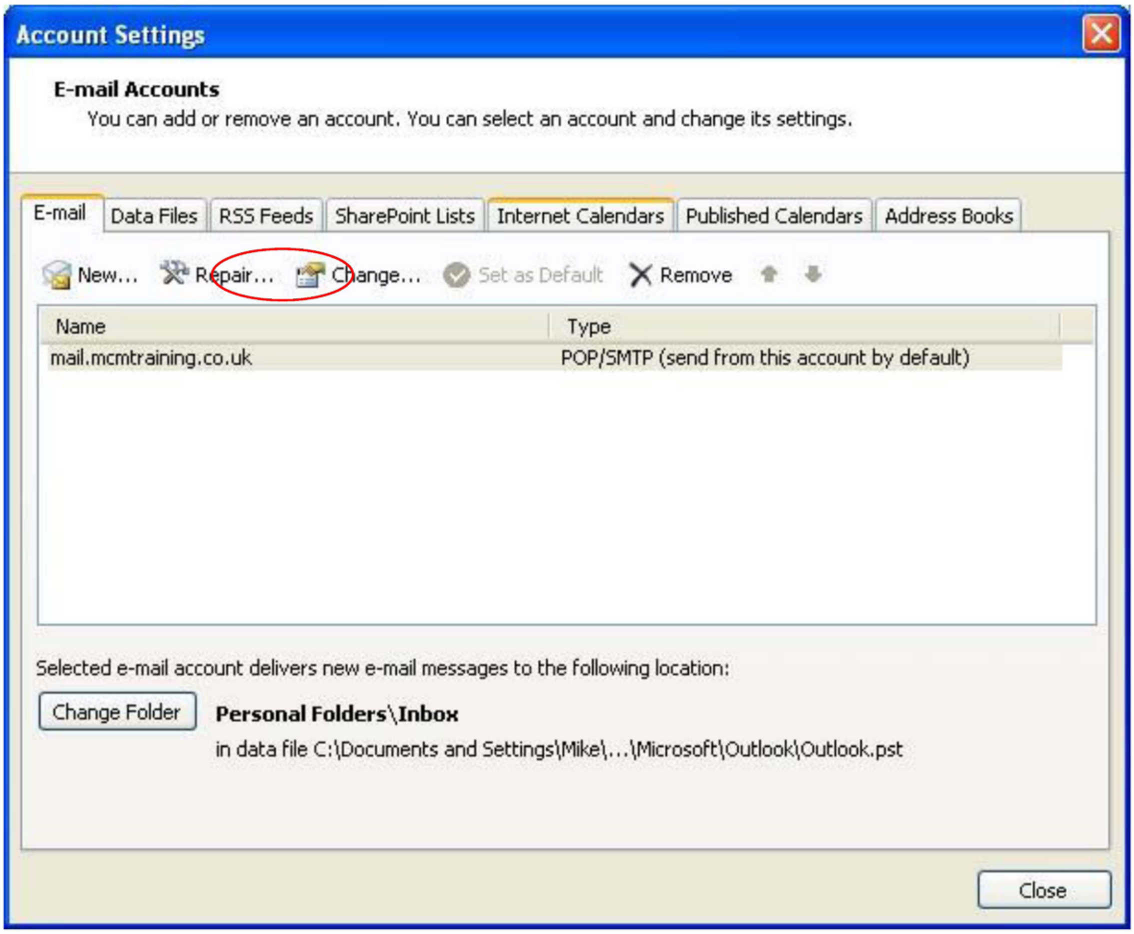


Figure 1-6: The E-mail accounts editor wizard

Method

To make changes or ***edit*** an existing E-Mail account:

1. Select Tools, Account Settings.
2. In the Account Settings *dialog box* (Figure 1-6) make sure E-Mail tab is selected.
3. Click an account name in the E-Mail accounts dialog box (Figure 1-6.
4. Click the Change button.
5. Make the required changes.
6. Click **Next**.
7. Click **Finish**.

Views in Outlook 2007

To show birthdays for a particular month

1. Go to the Calendar Folder.
2. Select View |Current View |Annual Events to change to the Annual Events view.

3. Create a filter View |Arrange By | Current View | Customise Current View | Filter) to search for the word "Birthday" in the Subject field.
4. In the Filter dialog box, switch to the Advanced tab.
5. Choose the appropriate option.
6. Click OK, and you'll see a list of all of the birthdays in your calendar during that month.

To show separate business and personal calendars

This applies to all versions of Microsoft Outlook

1. Add two categories -- Personal and Business work fine -- and apply one or the other to each of your appointments.
2. Create two filters for the Calendar folder, one to show only the Personal category, the other displaying only the Business category. (Or you might set up the second filter to show everything that isn't the Personal category -- just to make sure you don't miss any uncategorized appointments.)
3. Right-click the Calendar icon in the Outlook Bar and choose Open in New Window. Apply the Personal-only filter to this window.
4. Right-click the Calendar icon in the Outlook Bar and choose Open in New Window. (This is the second Calendar window) Apply the other filter to this window.

You should now have 3 Outlook windows -- one for your Personal calendar, one for the rest of your appointments and the original window, where you can view e-mail, Contacts, etc. If you still have all three open when you close Outlook, the Calendar windows, with their filter settings, should be restored the next time you run Outlook.

Tip: To display weekday names in a Calendar weekly view

Outlook depends on the "long" date format set for all Windows programs. Use **Control Panel | Regional Settings | Date** to change the long date format so that it includes the name of the day of the week.

Miscellaneous Features in Outlook 2007

The Attachment Preview Feature

Outlook 2007 includes an Attachment preview feature that allows you to preview an attachment before you open it. This can be quite useful especially if you have a lot of attachments to one email and are looking for a specific one. Figure 1-7 shows the attachment preview feature.

Figure 1-7 : Attachment Preview Feature

Method

To use the attachment preview:

1. Select an email message with an attachment.
2. Single click on the attachment icon as highlighted in Figure 1-7

Appendix B Classroom Setup

Objectives

- Classroom Setup

Topics

Preparing Outlook on Your Server
Preparing Files and Sending Messages
Preparing Outlook on Each Workstation
Changing Outlook Default Settings
Import and Export Wizard
After Training or Before Your Next Outlook Course

Preparing Outlook on Your Server

Preparation of Outlook for class falls into two categories:

- actions that you or your Mail/Outlook Administrator must perform on your server to create student mailboxes
- actions that you must take to copy student data files and send messages to each class member

The Mail/Outlook Administrator for your local area network can be a key partner in assisting you to prepare for a successful Outlook class. The simplest way to prepare for the class, if you are already running on a LAN with Microsoft Mail or Outlook, is for your administrator to set up the necessary mailboxes.

Option 1: Setting Up Outlook on a LAN

The Mail/Outlook Administrator should create student and instructor user names and groups as indicated in Table D-1 below.

Student User I.D.s	Create a minimum of 8 mailboxes as follows. The Name and Mailbox name should be the same. student1 student2 student3 student4 student5 student6 student7 student8
Instructor User I.D.	Create a mailbox for the instructor. The Name and Mailbox name for the instructor is Instruct.
Groups	Create a group called Class that contains all the names of the students and the instructor.
Passwords	The default password for Outlook is password. You might want to change the initial password to something else.

Table D-18: Mail/Outlook Administrator User Setup

Preparing Files and Sending Messages

The data diskette/CD included with this course contains several files that are used as the basis for student messages, contacts, and notes.

Journal.doc and Specials List.doc

The Journal.doc and the Specials List.doc files are Word document files for use with Section 6, Keeping a Journal and Utilizing Notes. Copy these files to each workstation by opening Explorer and copying the Data folder from the data diskette to the root level of the hard drive.

Mailbox.pst

The mailbox.pst file on the data disk contains the initial data you need to install on each student's computer. This data includes sent messages, contacts, and notes that students view in Section 1 and use from time to time in other sections.

Copy this file to the default mail folder on each workstation. If Microsoft Exchange was previously installed on the workstation, this folder will be C:\Exchange. If you want to use a folder other that the default, first, create the new folder. Then, use Mail in the Control Panel to create a new profile at each workstation. When the Wizard prompts you for the location of your Personal Address Book and Personal Folder, enter the name of the new folder.

.rtf Files

The .rtf files and the corresponding message titles listed in Table D-2 are for your use in preparing messages for the class. These files are also located on the accompanying data disk.

File/Message Name
Outlook
Kerry Owen Farewell
Vendor Meeting

Table D-19: Message Files for the Class

Method

To prepare and send a message for class:

1. Start Outlook.
2. Start WordPad or Word.
3. Open the **Outlook.rtf** file and copy all the text.
4. Switch back to Outlook (on the taskbar, click the Inbox button).
5. On the toolbar, click the New Message button.
6. Address the message to the Class group.
7. Enter the message subject using the message title.
8. Paste the text you copied in WordPad into the message body.
9. Send the message.
   or

10. Close the message without sending, and send the message immediately before class.

Preparing Outlook on Each Workstation

Before a student can use Outlook for the first time on a workstation, you must create a user profile on that workstation. Subsequent students can use the previously prepared profile.

Each class session should appear to be the first that anyone is using Outlook on each student workstation. You must prepare the workstation so that the default Outlook settings match the settings in the lessons.

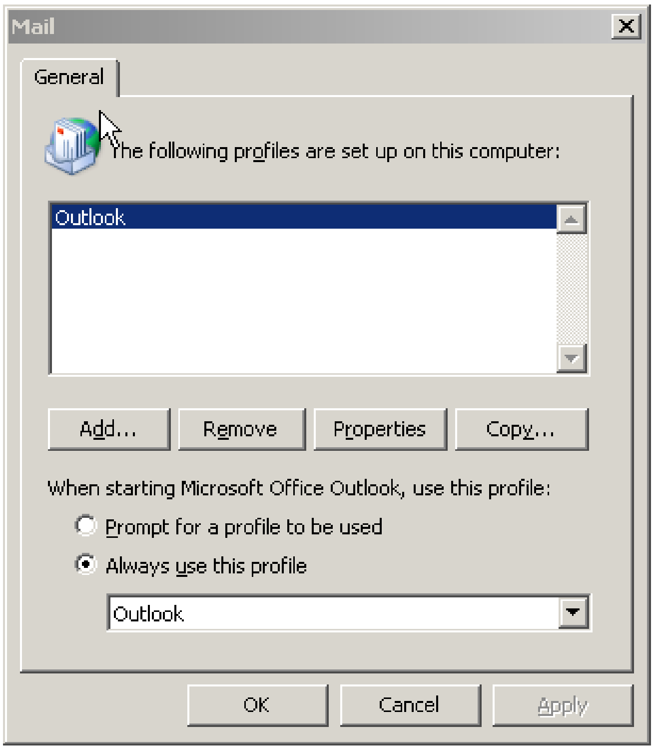
Creating a User Profile on a Workstation

Each student workstation must have a user profile. You only need to create this profile once. Assign the first workstation the user name student1, the second student2, and so forth, matching the names you used in setting up Outlook on your server.

Method

To create a user profile on a workstation:

1. In the Control Panel, double-click the Mail icon.
2. In the Mail Setup dialog box, click the Show Profiles button.



3. In the Mail dialog box, on the General page, choose Add, and then follow the instructions in the Inbox Setup Wizard. Make the following selections:

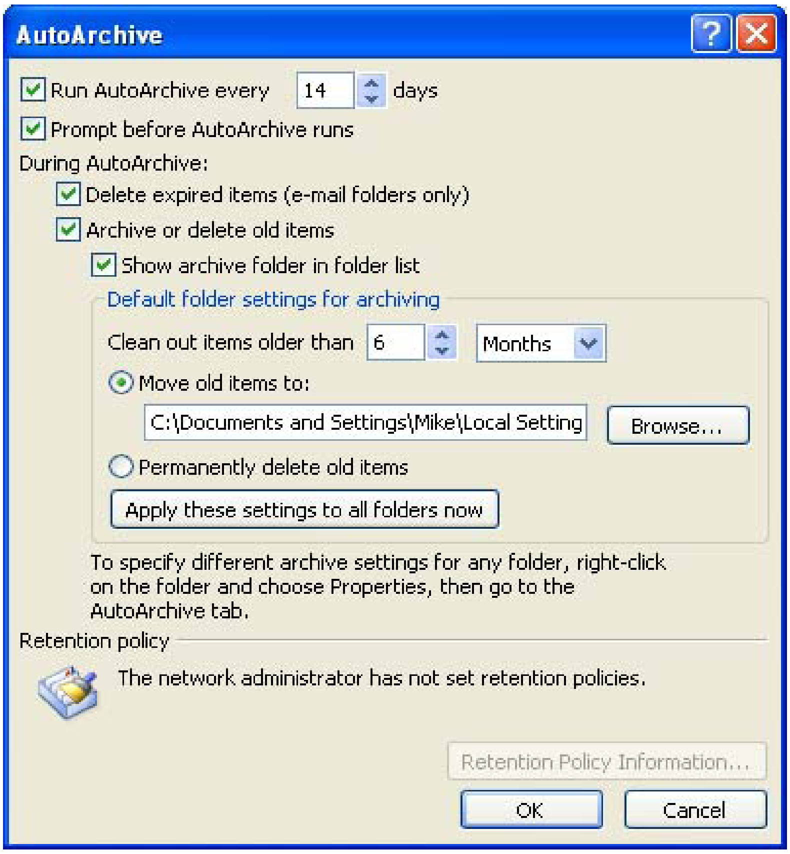
a) For the information service, select Microsoft Mail.
b) For the Profile Name, use student1, student2, and so forth.
c) For the postoffice path, check with your system administrator, or, if you've set up your own postoffice, choose Browse and navigate to the computer and directory on which the postoffice is stored. Expand the **Postofc** folder and select the **wgpo0000** folder.
d) From the user list, select student1, student2, and so forth.
e) For the password, type **password** or the password you assigned when setting up the user.
f) For the Personal Address Book, indicate the directory into which you copied the **mailbox.pst** file.
g) For the Personal folders, indicate the same directory as the previous step.

Changing Outlook Default Settings

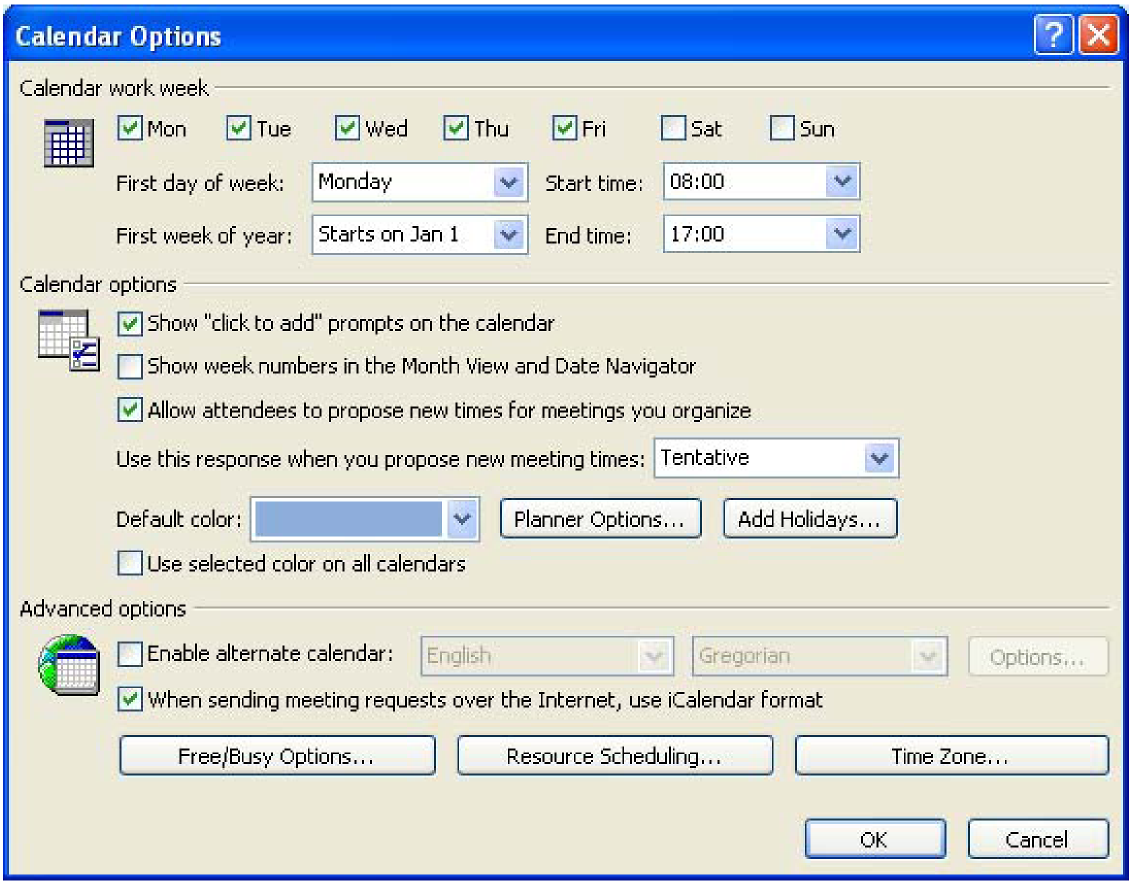
When you install Office, do at least a typical installation, including Outlook and Word. Be sure to install the Office Assistant and have one or more Office CD-ROMs available in the classroom for changing the Office Assistant. Use Microsoft Word as the e-mail editor.

In the Outlook Options dialog box, make the following changes to the default settings:

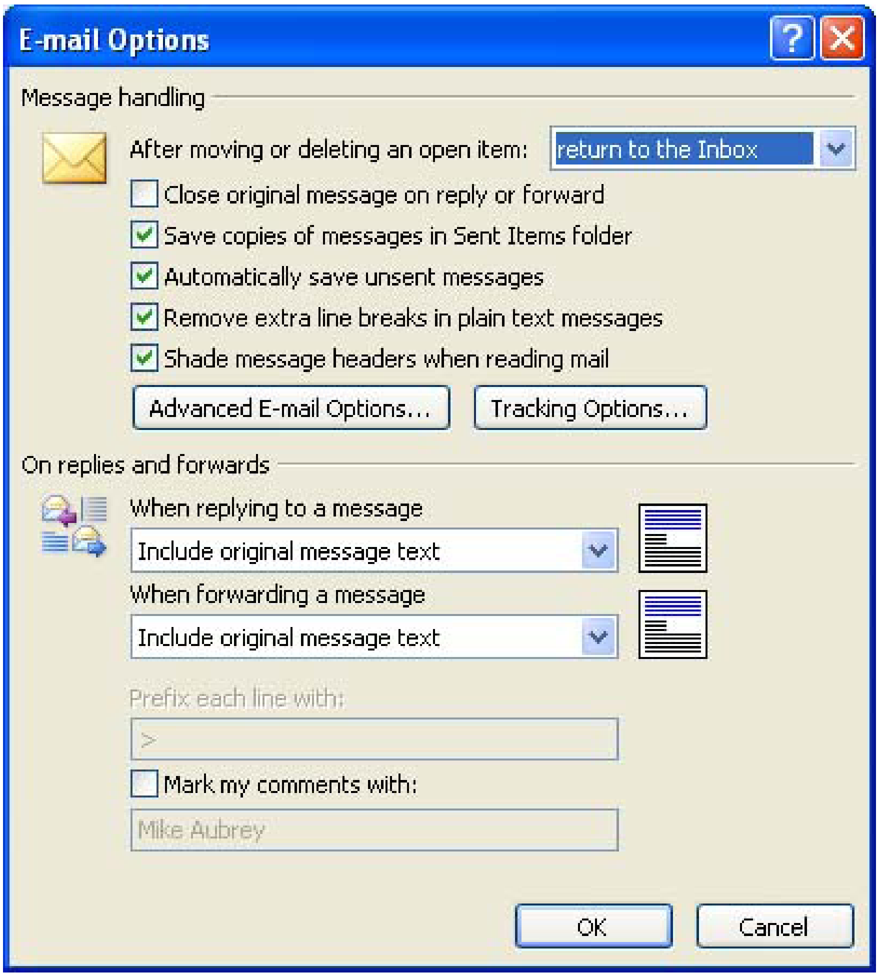
- On the AutoArchive (Tools>Options>other page>AutoArchive) page, deselect the *Run AutoArchive every… days at startup* check box.



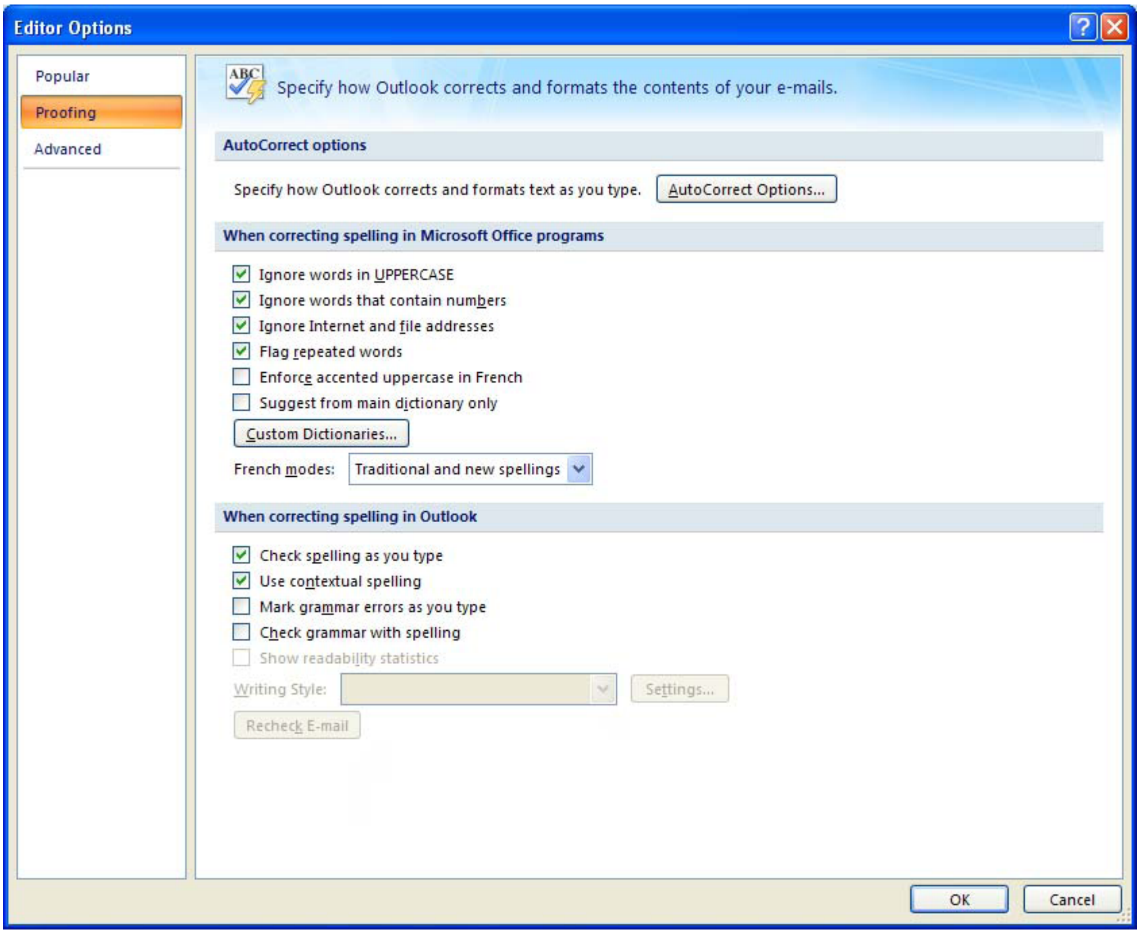
- On the Calendar page, in the Calendar working hours area, in the Start time drop-down list box, enter 9:00 AM.


Calendar Options
Calendar work week
Mon
Tue
Wed
Thu
Fri
Sat
Sun
First day of week:
Monday
Start time:
08:00
First week of year:
Starts on Jan 1
End time:
17:00
Calendar options
Show "click to add" prompts on the calendar
Show week numbers in the Month View and Date Navigator
Allow attendees to propose new times for meetings you organize
Use this response when you propose new meeting times:
Tentative
Default color:
Planner Options...
Add Holidays...
Use selected color on all calendars
Advanced options
Enable alternate calendar:
English
Gregorian
Options...
When sending meeting requests over the Internet, use iCalendar format
Free/Busy Options...
Resource Scheduling...
Time Zone...
OK
Cancel

- On the E-Mail Options page, select the *Close original message on reply or forward* check box.



- On the Spelling page, select the *Always check spelling before sending* check box.



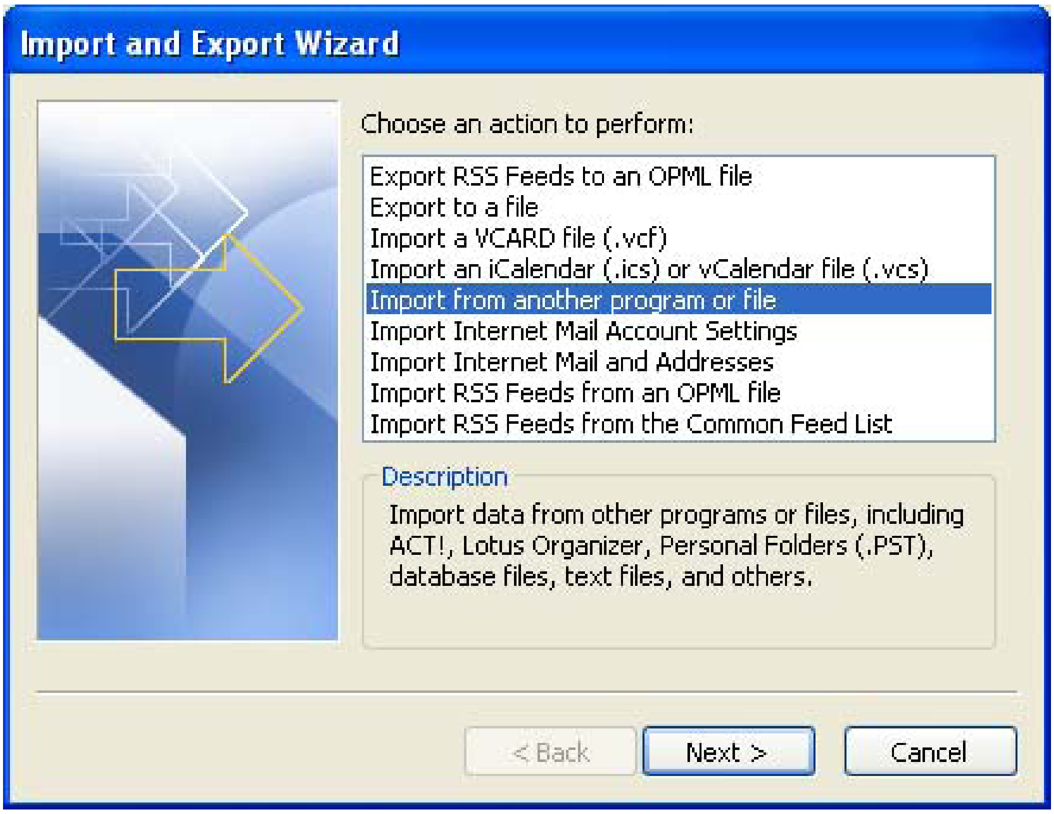
Checking Your Setup

After you've configured the mail server and each workstation, check each workstation. Log in with the user name and password that you assigned to the workstation. Make sure the three messages appear in the Inbox. You should also see entries in other folders, such as Calendar, Contacts, Tasks and Notes. If these entries are not present, you will need to import the **mailbox.pst** file.

Method

To import the **mailbox.pst** file:

1. From the File menu, choose Import and Export.
2. In the first page of the Wizard, select *Import from another program or file* and then choose Next.
3. In the next page of the Wizard, in the File to import text box, enter the location of the **mailbox.pst**.
4. In the Options area, make sure *Replace duplicates with items imported* is selected, and then choose Next.
5. In the next page of the Wizard, accept the defaults and then choose Finish.



Import and Export Wizard

After Training or Before Your Next Outlook Course

After each course or before your next Outlook course, delete the mailbox.pst file and replace with a fresh copy from the Data diskette. Resend the messages required for the course. The files in the Data folder are not modified during the course and don't need to be replaced.

Appendix C Additional Features in Office 2007

Topics

Office 2007 – A New Platform
At a Glance Highlights Across the Suite
New Visual and navigational Features
File formats
User Assistance System (HELP)
Collaboration features
Themes and Quick Styles
Application-specific changes
General Keyboard Navigational Tips in Office 2007
Beyond Office 2007

Office 2007 – A New Platform

New Workspace Environment

Office 2007 applications share a common user interface, as with previous versions. So, when you've learned how to navigate around one application, you can apply the same concepts and a lot of the commands to the other applications in the suite. But the workspace environment has changed dramatically in version 2007.

Unlike in previous versions, this has extended to Microsoft Access. Previously the database application worked a bit differently to the other applications in the suite. The views and ways of working in Microsoft Access are now pretty similar to those in Word and Excel, so even if you don't know anything about the concept of database design and administration, you'll see a lot of familiarity in the application after using other applications in the suite.

But, the visual aspect has changed and gone is the primary menu-driven way of working Office applications. The new workspace uses toolbars as the primary method, although many buttons and icons launch drop-down menus or options menus. And, of course, buttons and commands still launch dialog boxes. The 'toolbars' are not referred to as such in the new Microsoft documentation and Microsoft Help. Except – The 'Quick Access Toolbar' which appears top left of the Ribbon, next to the Office button. See Figure 2-1. The default Quick Access Toolbar buttons are Save (floppy disk icon), Undo and Redo. This Quick Access Toolbar is fully customisable and can be placed elsewhere around the top of the screen, as preferred by the user.

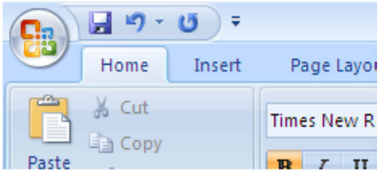


Figure 2-23: The Office button, displaying the Microsoft Office logo, is next to the Quick Access Toolbar

The concept on which the new release of Microsoft Office rest is that all users should (*should*) be able to see the command or option they want. And if they can't, by logical clicking around they will come across it quite rapidly. The screen is more logical, the commands and options altogether more visual, and the environment truly user friendly. It's tuned to the wandering eye and the wandering mouse. The point is that you do not need to know or learn where commands are on certain menus. To a great extent this is achieved in this version, mainly because the way of working and navigating is in tune with web page browsing which we all do.

What you see on the screen is a 'Ribbon'. And the default is the Home Ribbon. More about that later. Above the ribbon are a number of key words that launch other ribbons (or 'toolbars') that fill up the top section off the screen. Each Ribbon contains several sections, often named 'tabs'.

In Figure B-2, on show is the Microsoft Word Home Ribbon. Note the other ribbons available – Insert, Page Layout, references, etc. Also note the available tabs – Clipboard, Font, Paragraph, etc.

Figure B-24: The Home Ribbon

Surprisingly, given the dramatic change of the workspace environment, if you are an experienced Office user you will find it remarkable easy to find the new commands and apply skills and knowledge you already have. If you are a new user, welcome to the easiest to use version yet, and – by far, the easiest on the eye and brain!

Compatibility

The background coding or structure of the programs has changed as well. So there are compatibility issues that crop up all the time. This is very important if you will be sharing files with people not on version 2007. In version 2003 Microsoft Word documents created there, in the **.doc** format, were compatible with all versions of Office from v97, through 2000 and 2002, to v2003. But in v2007 the default Word file format is **.docx**, which is not readable in earlier versions. You may have to save additional versions or save to an earlier one (e.g. v97 – v2003 format) if you want your document to be read by most Office users. That said, v2007 is expected to receive a very broad take-up. Much greater than v2003. Within a year you might find the **.docx** format quite widely used.

At a Glance Highlights Across the Suite

- **Microsoft Office Access 2007 (the database program)**

The new version supports PDF and XPS support. This is quite important. With Office Access 2007 you can save a report as a Portable Document Format file (PDF) or in XML Paper Specification (XPS) format for printing, posting, and e-mail distribution. By saving your report as a PDF or XPS file, you can capture report information in a form that retains all of your formatting characteristics yet does not require others to have Access 2007 to print or review your report.

- **Microsoft Office Excel 2007 (the spreadsheet program)**

Create professional-looking charts more easily with a completely redesigned charting engine. Apply rich visual enhancements to your chart, such as 3-D, soft shadowing, and transparency. Create and interact with charts the same way, regardless of the application you are using, because the Office Excel 2007 charting engine is consistent in Microsoft Office Word 2007 and Microsoft Office PowerPoint 2007.

- **Microsoft Office Groove 2007 (a collaboration software program)**

When you create a Groove 'workspace', everyone can share information and work together. You can participate by posting messages and responses, sharing files, and tracking projects and meetings on your shared space. There are three kinds of workspaces:

1. File sharing, which is a workspace for synchronizing a selected Windows folder across computers.
2. Standard workspace, which is a workspace with a Files tool and a Discussions tool.
3. Template workspace, which offers a workspace with tools you select from a list, such as Calendar, where you can mark important dates and build collaborative schedules with workspace members; Sketchpad (where you can use drawing tools); and even Chess Game.

- **Microsoft Office InfoPath 2007 (an application for creating forms that teams and organizations can use to gather and share information)**

Gather information using Microsoft Office Outlook 2007 e-mail messages. With Office InfoPath 2007, you can complete forms without leaving the familiar Office Outlook 2007 environment, helping you complete your forms quickly and efficiently.

- **Microsoft Office OneNote 2007 (a flexible program that provides people one place to gather virtually any type of information — written, doodled, or typed)**

Two-way, automatic task synchronization with 2003 and 2007 versions of Outlook, which lets you keep your busy life well ordered and highly productive.

- **Office Outlook 2007 (e-mail, calendars, and contacts)**

RSS! You can now fully subscribe to and interact with Really Simple Syndication (RSS) feeds right from Office Outlook 2007, the most natural place to manage this kind of information. No more hunting around for just the right kind of client to get your RSS content. Get your daily dose of news along with your daily dose of e-mail.

- **Office PowerPoint 2007 (the presentation program)**

Dramatically modify shapes, text, and graphics with new tools and effects. You can now manipulate and work with your text, tables, charts, and other presentation elements in much richer ways than ever before. Office PowerPoint 2007 makes these tools readily available through the streamlined user interface and contextual tabs, so that in just a few clicks, you can add impact to your work.

- **Microsoft Office Project 2007 (the complete collection of planning products that helps you keep track of the various schedules of the people, places, and things you deal with on a daily, weekly, monthly, or project basis)**

There are a couple of important new features:

1) You can use **Top-Down Budgeting** to define a budget at a high level (entire program or project) so the project manager can allocate funds and track costs against the budget, and…
2) Planned and actual costs can be assigned to a task with **Cost Resources**, which also supports integration of Project with accounting systems. Both these items make dealing with costs and accounting a whole lot simpler.

- **Microsoft Office Publisher 2007 (business publishing and marketing materials desktop print and Web publishing application)**

The addition of PDF capability. You can now save Office Publisher 2007 files in a fixed file format, such as Portable Document Format file (PDF) or XML Paper Specification (XPS), for easy sharing. PDF settings within Office Publisher 2007 include options for online viewing, desktop printing, and commercial press-ready printing.

- **Microsoft Office Visio 2007 (a diagramming and data visualization program)**

Connect shapes without drawing connectors. New connector functionality in Office Visio 2007 connects shapes, distributes them evenly, and aligns them for you — with only one click. When you move the connected shapes, they stay connected and the connectors automatically reroute between the shapes.

- **Microsoft Office Word 2007**

In a phrase: **Building Blocks**. This new feature is a way to add frequently used content to your documents. Select from a predefined gallery of cover pages, pull quotes, headers, and footers to make your documents look more professional. You can even create your own Building Blocks to simplify the addition of custom text, like legal disclaimer text or other frequently used materials.

New Visual and navigational Features

The Office Button

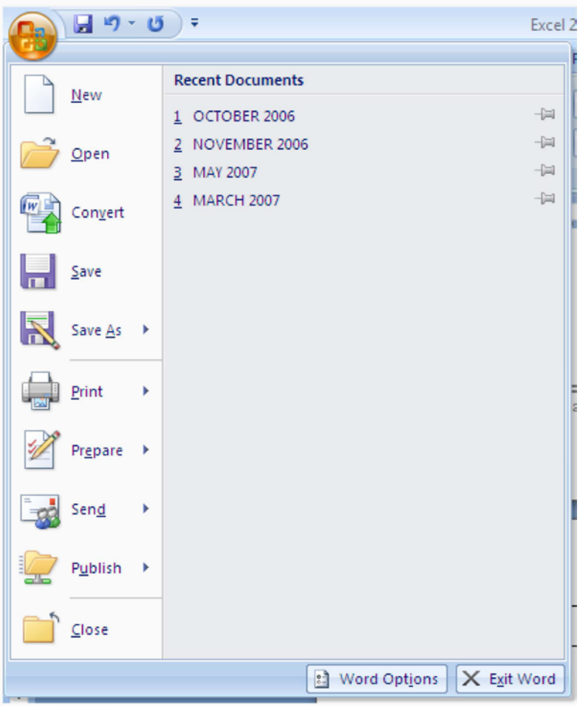


Figure B-25: The Office Button (once clicked) shown here in Microsoft Word.

The Office 2007 button, located on the top-left of the window, replaces the *File* menu and provides access to functionality common across all Office applications, including but not limited to Opening, Saving, Printing, and Sharing a file. Users can also choose color schemes for the interface.

Ribbon

The *Ribbon*, a panel that houses the command buttons and icons, organizes commands as a set of *Tabs*, each grouping relevant commands. Each application has a different set of tabs which expose the functionality that application offers. For example, while Excel has a tab for the Graphing capabilities, Word does not feature the same; instead it has tabs to control the formatting of a text document. Within each tab, various related options may be grouped together. The *Ribbon* is designed to make the features of the application more discoverable and accessible with fewer mouse clicks as compared to the menu-based UI used until Office 2007.

Contextual Tabs

Some tabs, called *Contextual Tabs*, appear only when certain objects are selected. Contextual Tabs expose functionality specific only to the object with focus. For example, selecting a picture brings up the *Pictures* tab, which presents options for dealing with the picture. Similarly, focusing on a table exposes table-related options in a specific tab. Contextual tabs remain hidden when the object it works on are not selected.

Live Preview

Microsoft Office 2007 also introduces a feature called "Live Preview", which temporarily applies formatting on the focused text or object, when any formatting button is moused-over. The temporary formatting is removed when the mouse pointer is moved from the button. This allows users to have a preview of how the option would affect the appearance of the object, without actually applying it.

Mini Toolbar

The new "Mini Toolbar" is a type of context menu that is automatically shown (by default) when text is selected. The purpose of this feature is to provide easy access to the most-used formatting commands without requiring a right-mouse-button click as was necessary in older versions of the software. Since the Mini Toolbar is automatically shown, it remains semi-transparent until the mouse pointer is situated on the control, in order to allow an almost-unobstructed view of what is beneath it. It also appears above the right-click menu when a user right-clicks on a selection of words.

Other UI features

Super-tooltips, that can house formatted text as well as images, are used to provide detailed descriptions of what most buttons do.

The *Quick Access toolbar*, which sits in the title bar, serves as a repository of most used functions, regardless of which application is being used, such as save, undo/redo and print.

Zoom slider present in the bottom-right corner, allowing for dynamic and rapid magnification of documents

SmartArt

SmartArt, found under the Insert tab in the ribbon in PowerPoint, Word, Excel, and Outlook, is a new group of easily editable and formatted diagrams. There are 115 preset SmartArt graphics layout templates (as of Beta 2 Technical Refresh) in categories such as list, process, cycle, and hierarchy. When an instance of a SmartArt is inserted, a *Text Pane* appears next to it to guide the user through entering text in the hierarchical levels. Each SmartArt graphic, based on its design, maps the text outline, automatically resized for best fit, onto the graphic. There are a number of "quick styles" for each graphic that apply largely different 3D effects to the graphic, and the graphic's shapes and text can be formatted through shape styles and WordArt styles. In addition, SmartArt graphics change their colors, fonts, and effects to match the document's theme.

Microsoft Word 2007's help feature recommends SmartArt graphics for organization charts of fewer than 30 shapes that have 3D effects (such as bevels and glows) applied to them. It suggests Microsoft Visio organization charts for charts of up to 1000 shapes that must be precisely customizable.

File formats

Microsoft Office uses a new file format, called Office OpenXML, as the default file format. Word documents (without macro extensions) are now saved using a .docx extension rather than the traditional .doc extension. Word 2007 can also save documents in the old format so that they will still be usable in previous versions of Word. In addition, Microsoft has made available a free add-on that lets older Office editions open documents created under the new 2007 format.

OpenXML is based on XML and uses the ZIP file container. According to Microsoft, documents created in this format are up to 75% smaller than the same documents saved with previous Microsoft Office file formats, owing to data compression. Microsoft Office Excel and Microsoft Office PowerPoint also use the new OOXML file formats. Word files containing macros are saved with the extension .docm.

Microsoft had initially announced that it will support export to Portable Document Format (PDF) in Office 2007. However, due to legal objections from Adobe Systems, Office 2007 will not have PDF support out of the box, but rather as a separate free download. Office 2007 documents can also be exported as XPS documents, via another free plug-in that is also a separate download.

Microsoft backs an open-source effort to support OpenDocument in Office 2007, as well as earlier versions, and also through a converter add-in for other programs, which works by having third-party programs call a command-line utility. As of yet, the project only supports conversions between OpenDocument Text and Office Open XML Word documents.

User Assistance System (HELP)

In Microsoft Office 2007, the Office Assistants have been completely removed because of the much improved help system. One feature of the new help system is the extensive use of Super Tooltips which explains in about one paragraph what each function performs. Some of them also use diagrams or pictures. These appear and disappear like normal tooltips, and replace normal tooltips in many areas.

Collaboration features

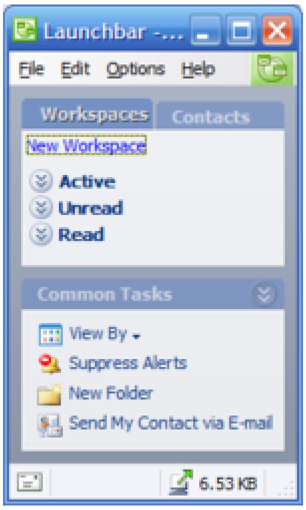


Figure B-26: Microsoft Office Groove 2007

Microsoft Office 2007 includes features geared towards collaboration and data sharing. As such, Microsoft Office 2007 features server components for applications such as Excel, which work in conjunction with SharePoint Services, to provide a collaboration platform. SharePoint works with Microsoft Office SharePoint Server 2007, which is used to host a SharePoint site, and uses IIS and ASP.NET 2.0. Excel server exposes Excel Services, which allows any worksheet to be created, edited and maintained via web browsers. it features Excel Web Access, the client-side component which is used to render the worksheet on a browser, Excel Calculation Service which is the server side component which populates the worksheet with data and perform calculations, and Excel Web Service that exposes Excel functionalities as individual web services. Sharepoint can also be used to host Word documents for collaborative editing, by sharing a document. SharePoint can also be used to hold PowerPoint slides in a Slide Library, from which the slides can be used as a formatting template. It will also notify users of a slide automatically in case the source slide is modified. Also by using SharePoint, Powerpoint can manage shared review of presentations. Any SharePoint hosted document can be accessed from the application which created the document or from other applications such as a browser or Microsoft Office Outlook.

Microsoft Office 2007 also includes Groove, which brings collaborative features to a peer-to-peer paradigm. Groove can host documents, including presentations, workbooks and others, created in Microsoft Office 2007 application in a shared workspace, which can then be used in collaborative editing of documents. Groove can also be used in managing workspace sessions, including access control of the workspace. To collaborate on one or more documents, a Workspace has to be created, and then those who are to work on it have to be invited. Any file shared on the workspace are automatically shared among all participants. The application also provides real-time messaging, including one-to-one as well as group messaging, and presence features, as well as monitoring workspace activities with alerts, which are raised when pre-defined set of activities are detected. Groove also provides features for conflict resolution for conflicting edits. Schedules for a collaboration can also be decided by using a built-in shared calendar, which can also be used to keep track of the progress of a project. However, the calendar is not compatible with Microsoft Outlook.

Themes and Quick Styles

Microsoft Office 2007 places a huge emphasis on Document Themes and Quick Styles. The Document Theme defines the colors, fonts and graphic effects for a document. Almost everything that can be inserted into a document is automatically styled to match the overall document theme creating a consistent document design. The new Office Theme file format (.THMX) is shared between Word, Excel, PowerPoint and Outlook email messages. Similar themes are also available for data reports in Access and Project or shapes in Visio.

Quick Styles are galleries with a range of styles based on the current theme. There are quick styles galleries for text, tables, charts, SmartArt, WordArt and more. The style range goes from simple/light to more graphically/darker.

Application-specific changes

Microsoft Office Word

Blog entries can be authored in Word itself and uploaded directly to a blog. Supported blogging sites include Windows Live Spaces, WordPress, SharePoint, Blogger, Community Server etc.

New style sheets (quick styles) and ability to switch easily among them.

Word count listed by default in the status bar. The word count dynamically updates as you type.

New *contextual spell checker* sometimes catches incorrect usage of correctly spelled words, such as in “I think we will *loose* this battle”.

Translation tool tip option available for English (U.S.), French (France), and Spanish (International Sort). When selected, hovering the mouse cursor over a word will display its translation in the particular language. Non-English versions have different sets of languages. Other languages can be added by using a separate multilingual pack.

Automated generation of citations and bibliographies according to defined style rules, including APA, Chicago, and MLA. Changing style updates all references automatically. Connect to web services to access online reference databases.

Rearchitected native mathematical equation support with TeX-like linear input/edit language or GUI interface. Also supports the Unicode Plain Text Encoding of Mathematics.

Preset gallery of cover pages with fields for Author, Title, Date, Abstract, etc. Cover pages follow the theme of the document (found under the Page Layout tab).

Document comparison engine updated to support moves, differences in tables, and also easy to follow tri-pane view of original document, new document, and differences.

Full screen reading layout that shows two pages at a time with maximal screen usage, plus a few critical tools for reviewing.

Document Inspector which strips Word documents of information such as author name and comments and other "metadata".

Building Blocks, which lets one save frequently used content, so that they are easily accessible for further use. Building blocks can have data mapped controls in them to allow for form building or structured document authoring.

Microsoft Office Outlook

- As a major change in Outlook 2007, Exchange 5.5 support has been dropped. Like Evolution, Outlook Express and Entourage, Outlook now works only with Exchange 2000 and above.
- Outlook now indexes (using the Windows Search APIs) the e-mails, contacts, tasks, calendar entries, RSS feeds and other items, to speed up searches. As such, it features word-wheeled search, which displays results as characters are being typed in.
- Search folders, which are saved searches, have been updated to include RSS feeds as well. Search folders can be created with a specific search criteria, specifying the subject, type and other attributes of the information being searched. When a search folder is opened, all matching items for the search are automatically retrieved and grouped up.
- Outlook now supports text-messages and SMSs, when used in conjunction with Exchange Server 2007 Unified Messaging.
- Outlook includes a reader for RSS feeds, which used the Windows Common Feeds Store. RSS subscription URLs can be shared via e-mails. RSS feed updates can also be pushed to a mobile device.
- Outlook can now support multiple calendars being worked with, simultaneously. It also includes a side-by-side view for calendars, where each calendar is displayed in a different tab, and allows easy comparison of them. Outlook also supports web calendars. Calendars can be shared with other users.
- Calendar view shows which tasks are due.
- Flagged e-mails and notes can also be converted to Task items.
- Outlook includes a To Do Bar, which integrates the calendar, appointments and tasks items, in a concise view.
- Online or Offline editing of all Microsoft office 2007 documents via a SharePoint site. All edits are automatically synchronized.
- Contacts can be shared among users, via e-mail, Exchange server or a SharePoint site.

- Attachment preview allows users to view Office e-mail attachments in the reading pane rather than having to open another program.
- HTML in e-mails is now rendered using the Microsoft Word rendering engine which disallows several HTML tags like object, script, iframe etc along with several CSS properties.

Microsoft Office Outlook can also include an optional Business Contact Manager which allows management of business contacts and their sales and marketing activities. Phone calls, e-mails, appointments, notes and other business metrics can be managed for each contact. It can also keep a track of billable time for each contact on the Outlook Calendar. Based on these data, a consolidated report view can be generated by Microsoft Office Outlook with Business Contact Manager. The data can be further analyzed using Microsoft Office Excel. This data can also be shared using SharePoint services.

Microsoft Office Excel

- Support up to 1,048,576 rows and 16,384 columns in a single worksheet, with 32,767 characters in a single cell (17,179,869,184 cells in a worksheet, 562,932,773,552,128 characters in a worksheet)
- Conditional Formatting introduces support for three new features — Color Scales, Icon Sets and Data Bars
- Color Scales, which automatically color the background of a group of cells with different colors according to the values.

- Icon sets, which precede the text in a cell with an icon that represent some aspect of the value of the cell with respect to other values in a group of cells, can also be applied. Icons can be conditionally applied to show up only when certain criteria is met, such as a cross showing up on an invalid value, where the condition for invalidity can be specified by the user.
- Data Bars show as a gradient bar in the background of a cell the contribution of the cell value in the group.

- Column titles can optionally show options to control the layout of the column.
- Multithreaded calculation of formulae, to speed up large calculations, especially on multi-core/multi-processor systems.
- User Defined Functions (UDF), which are custom functions written to supplement Excel's set of built-in functions, supports the increased number of cells and columns. UDFs now can also be multithreaded. Server side UDFs are based on the .NET Managed code.
- Importing data from external sources, such as a database, has been upgraded. Data can also be imported from formatted tables and reports, which do not have a regular grid structure.
- Formula Autocomplete, automatically suggests function names, arguments and named ranges, and automatically completing them if desired, based on the characters entered. Formulae can refer to a table as well.
- CUBE functions which allow importing data, including set aggregated data, from data analysis services, such as SQL Server Analysis Services.
- Page Layout view, to author spreadsheets in a way that mirrors the formatting that will be applied when printed.
- PivotTables, which are used to create analysis reports out of sets of data, can now support hierarchical data by displaying a row in the table with a "+" icon, which, when clicked, shows more rows regarding it, which can also be hierarchical. PivotTables can also be sorted and filtered independently, and conditional formatting used to highlight trends in the data.

- Filters, now includes a Quick filter option allowing the selection of multiple items from a drop down list of items in the column. The option to filter based on color has been added to the choices available.
- Excel features a new charting engine, which supports advanced formatting, including 3D rendering, transparencies and shadows. Chart layouts can also be customized to highlight various trends in the data.

Microsoft Office PowerPoint

- Improvements to text rendering to support text based graphics.
- Rendering of 3D graphics.
- Support for many more sound file formats such as .mp3 and .wma.
- Support for tables and enhanced support for table pasting from Excel.
- Slide Library, which lets you reuse any slide or presentation as a template. Any presentation or slide can be published to the Slide Library.
- Any custom-designed slide library can be saved.
- Presentations can be digitally signed.
- Improved Presenter View.
- Added support for Widescreen Slides.
- Allows addition of custom placeholders.

Microsoft Office OneNote

- OneNote now supports multiple notebooks.
- Notebooks can be shared across multiple computers. Anyone can edit even while not connected and changes are merged automatically across machines when a connection is made. Changes are labeled with author and change time/date.
- Notebook templates.
- Word-wheeled search is also present in OneNote, which also indexes notes.
- Synchronization of Tasks with Outlook 2007. Also Outlook can send mails to OneNote, or open pages in OneNote that are linked to tasks, contacts, appointments/meetings.
- Support for tables. Using tabs to create tabular structure automatically converts it to a table.
- OCR is performed on images (screen clips, photos, scans) so that any text in them is searchable.
- Audio and video recordings are also tagged and indexed, so that they can be searched.
- Notes can have hyperlinks among themselves, or from outside OneNote to a specific point on a page.
- Embedding documents in notes.
- Extensibility support for add-ins.
- Drawing tools for creating diagrams in OneNote.
- Typing any arithmetic expression, followed by "=" results in the result of the calculation being displayed.
- Send to Microsoft OneNote, via which any application can print to a virtual printer for OneNote and the "printed" document is imported to the notebook, and any text is indexed for searching.
- OneNote Mobile is included for Smartphones and some PocketPC devices. Syncs notes two-way with OneNote. Takes text, voice, and photo notes.

Microsoft Office Access

- Access now includes support for a broader range of data types, including documents and images.
- Referential integrity checks. If any information is entered which doesn't have a related entry in another table, Access offers to either remove the entry or update the other table. (Note: This feature has existed since Access 2.0)
- Whenever any table is updated, all reports referencing the table are also updated.
- Dropdown lists for a table can be modified in place.
- Lookup Fields, which get their values by "looking up" some value in a table, have been updated to support multi valued lookups.
- Many new preset schemata are included.
- Access can synchronize with Windows SharePoint Services 3.0 and Office SharePoint Server 2007. This feature enables a user to use Access reports while using a server-based, backed-up, IT managed version of the data.

Microsoft Office Publisher

- Templates automatically fill out with information such as company name, logo etc, wherever applicable.
- Frequently used content can be stored in Content Store for quick access.
- A document can be automatically converted from one publication type, such as a newsletter, to another publication type, say a web page.
- Save as PDF supports commercial printing quality PDF.
- Catalog Merge can create publication content automatically by retrieving data, including text, images and other supported types, from an external data source.
- Design Checker, which is used to find design inconsistencies, has been updated.

Microsoft Office InfoPath

- InfoPath designed forms can now be used from a browser.
- A form can be sent out to people via e-mail. Such forms can be filled out from Outlook 2007 itself.
- Automatic conversion of forms in Word and Excel to InfoPath forms. Forms can also be exported to Excel.
- Forms can be published to a network share or to SharePoint server.
- Adding data validation, using validation formulae, and conditional formatting features without manually writing code.
- Print Layout view for designing forms in a view that mirror the printed layout. Such forms can be opened using Word as well.
- Ability to use Microsoft SQL Server, Microsoft Office Access, or other databases as back-end data repository.
- Multiple views for the same forms, to expose different features to different class of users.
- Template Parts, used to group Office InfoPath controls for use later. Template parts retain its XML schema.

Microsoft Office Visio

- PivotDiagrams, which are used to visualize data, show data groups and hierarchichal relationships.
- Visual modification of PivotDiagrams by dragging data around levels, to restructure the data relationships.
- PivotDiagrams can show aggregate statistical summaries for the data and show them.
- Shapes can be linked with external data sources. Doing so, the shapes are formatted according to the data. The data, and hence the shapes, are updated periodically. Such shapes can also be formatted manually using the Data Graphics feature.
- AutoConnect : Link easily two shapes.
- Data Link : Link data to shapes.
- Data Graphics : Dynamic objects (text and images) linked with external data.
- New Theme behaviour and new shapes.

Microsoft Office Project

- Ability to create custom templates.
- Any change in the project plan or schedule highlights everything else that is affected.
- Analyze changes without actually committing them. Changes can also be done and undone programmatically, to automate analysis of different changes.

- Improved cost resource management and analysis for projects.
- Project data can be used to automatically create charts and diagrams in Microsoft Office Excel and Microsoft Office Visio, respectively.
- The project schedule can be managed as 3D Gantt chart.
- Sharing project data with the help of SharePoint services.

Microsoft SharePoint Designer

- Microsoft Office SharePoint Designer 2007 is new addition to the Office suite replacing discontinued FrontPage for users of SharePoint. People who don't use SharePoint can use Microsoft Expression Web.
- Supports features and constructs that expose SharePoint functionality.
- Supports ASP.NET 2.0 and Windows Workflow Foundation.
- Support for creating workflows and data reports, from external data sources.
- Allows XML data to be displayed using XSLT

General Keyboard Navigational Tips in Office 2007

You will perhaps know by now about the Microsoft Office Button . This button is at the top left of the window (where the File menu was in previous versions of Office), and you can get there by using Key Tips, the TAB key, or arrow keys. There are Key Tip badges (and also underscored letters) in the menu to show you which letters to press to use a command, just as there were on menus in previous versions of Office. For more details on Key Tips within specific applications refer to the course manual or Appendix as necessary. But in Office applications in general, you may find the following information useful.

Here is a brief list of keystrokes you need for moving around office applications, if using the keyboard shortcuts is what you like to do.

- Use the TAB key and arrow keys to navigate a dialog box.
- Activate a command by pressing ENTER. In some cases, this opens a gallery or menu so you can choose what you want and then activate it by pressing ENTER again. For some commands, like the Font box, pressing ENTER puts the focus in the box so you can start typing, or use the arrow keys to scroll through lists. Once you've got what you want, press ENTER again.
- CTRL+TAB cycles through the tabs in a dialog box.
- SPACEBAR selects and clears check boxes.
- SHIFT+F10 opens the shortcut menu, which opens when you right-click an item.
- ESC closes an open dialog box or shortcut menu. If nothing is open, it takes the focus away from the Ribbon and back to the main document.
- To close a task pane, first press CTRL+SPACEBAR to open the task pane menu. Then press C to select Close on the menu.
- ALT+F4 (pressed simultaneously) closes the active window.
- F1 opens the Help window.

Beyond Office 2007

The next version or release of Microsoft Office

This is an important subject given that there are so many people who, at every new release of a version of Office, are unsure whether to get the new release or wait for the next one. For various reasons, many people and certainly many many organizations and companies skip a lot of new releases and choose the best time to 'migrate' to a new or current version/release.

Microsoft Office 14 is the working title for the next version of the Microsoft Office System productivity suite for Microsoft Windows. It entered development during 2006 while Microsoft was finishing work on Microsoft Office 12, which was released as the 2007 Microsoft Office System. The major version number 13 has been skipped presumably due to triskaidekaphobia (fear of or aversion to the number 13). presently, it is expected that Office 14 will ship in the first half of 2009 though this date has neither been confirmed nor denied by Microsoft.

According to an article published in InfoWorld in April 2006, Office 14 will be more 'role-based' than previous versions. The article cites Simon Witts, corporate vice president for Microsoft's Enterprise and Partner Group, as claiming that there would be features tailored to employees in "roles such as research and development professionals, sales persons, and human resources." Borrowing from ideas termed 'Web 2.0' when implemented on the Internet, it is likely that Microsoft will incorporate features of SharePoint Server in Office 14.